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## A PROFILE OF EMPLOYMENT IN THE AGRI-FOOD CHAIN

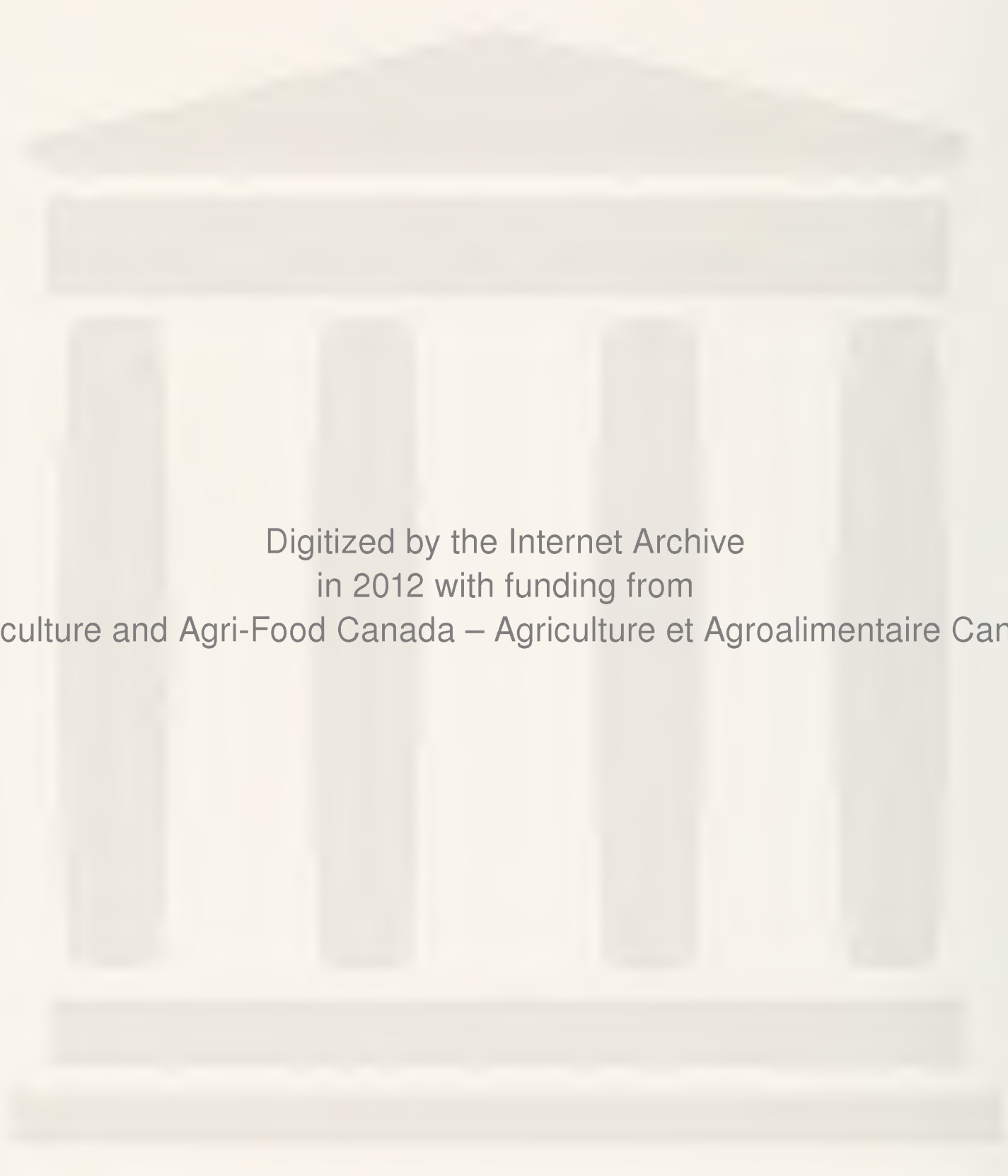
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# **A PROFILE OF EMPLOYMENT IN THE AGRI-FOOD CHAIN**

Cross-Sectoral Policy Development Division  
Industry, Performance and Analysis Directorate  
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# A PROFILE OF EMPLOYMENT IN THE AGRI-FOOD CHAIN

by

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Cross-Sectoral Policy Development Division  
Industry, Performance and Analysis Directorate  
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April 1999

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Vous pourriez également obtenir un exemplaire du rapport en français intitulé :  
*«Un profil de l'emploi dans le circuit agroalimentaire».*



**A PROFILE OF EMPLOYMENT  
IN THE AGRI-FOOD CHAIN**



## EXECUTIVE SUMMARY

This Working Paper provides an update of an earlier paper entitled "*A Profile of Employment in the Agri-Food Sector*" (WP No. 1-97). The previous paper covered the period from 1984-1995: in this paper information for 1996 and 1997 has been added. The information provided in this report is derived from a special tabulation of the Labour Force Survey and provides information on employment levels in the agri-food chain as well as the whole economy.

The agri-food chain employs over 1.8 million Canadians and accounts for 13.4% of total employment in Canada, making it an important source of employment for Canadians. The food service industry accounts for over 36% of employment in the agri-food chain. In 1997, employment levels in agri-food industries totalled:

| Agri-Food Industries | 1997 Employment | % Sector Employment |
|----------------------|-----------------|---------------------|
| Food Services        | 668             | 36 %                |
| Food Retail          | 424             | 23 %                |
| Agriculture          | 423             | 23 %                |
| Agri-Food Processing | 232             | 13 %                |
| Food Wholesale       | 100             | 5 %                 |

Employment in the agri-food chain has been generally growing since 1984. In 1997, employment levels in agri-food were 279,000 higher than in 1984. The strongest net employment gain was recorded in the food services and food retail industries. Employment in the agri-food processing industry (food, beverage and tobacco processing) remained fairly constant over this period, while in agriculture, employment levels dropped by 68,000 in 1997.

Most of the decline in agriculture occurred between 1984 and 1990, when employment in the industry fell by 50,000. Employment levels in agriculture fluctuated during the 1990's but still registered a net decline of 18,000 between 1990 and 1997.

During the 1990-91 recession, employment in most industries of the agri-food chain registered little change. From 1990 to 1992, the only industry to experience a significant decline in employment was food wholesale. Food services, on the other hand, registered a net gain of 15,000 in employment during this period.

Between 1993 and 1997, employment in food services grew faster than any other industry in the agri-food chain, increasing at a rate of 2.6% per year and registering a net gain of 78,000 jobs.

Part time employment in the agri-food chain grew at a faster rate than full time employment from 1984 to 1997. However, from 1993 to 1997, the growth rates for full timers and part timers were nearly equal in the agri-food chain, with full timers increasing at a slightly slower rate, 1.0% per year, than part timers, which grew at 1.2% per year. In the economy as a whole, on the other hand, full time employment grew at a slightly faster rate than part time employment during the last four years. Part time now makes up 43% of employment in the food services industry, while in food retail, 40% of employment is on a part time basis.

Agri-food accounted for no less than 12% of provincial employment in any of the provinces. In Saskatchewan more than one-quarter of employment was in agri-food industries. In Canada's two most populous provinces, Ontario and Quebec, employment in agri-food accounted for 12% and 13% of total provincial employment, respectively. These factors underscore the importance of the agri-food chain across Canada.

The agri-food chain is also an important source of employment for Canada's youth. In 1997, the chain employed 553,000 young Canadians (age 15-24), accounting for 27% of total youth employment, second only to the service sector (excluding food services). Fifty-four percent of youth employment in agri-food was in food services (mainly as servers and kitchen help). Youth make up about 45% of total employment in food services. In agriculture on the other hand, youth make up only 15% of total employment, including unpaid family labour. Canadians over the age of 55 make up a large proportion of those employed in agriculture, accounting for 25% of employment in the industry. This proportion is greater than the national average, where Canadians age 55 and over make up only 9% of employment.

Women accounted for a majority of employees in food service and food retail, accounting for 58% and 53% of employment in each industry respectively. Men, on the other hand, made up over two-thirds of employment in each of the agriculture, agri-food processing (food, beverage and tobacco processing) and food wholesale trade industries.

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## INTRODUCTION

Canada's labour market is rapidly changing as we approach the new millennium. Globalization and the rapidly expanding global marketplace have led to fundamental structural changes in the Canadian economy. In the private sector, industry has been going through a process of restructuring to position itself so it can compete in the global marketplace. In the public sector, many programs were scaled down or eliminated in order to reduce budget deficits and to begin the process of shrinking the debt that had accumulated over the past quarter century. While these developments have clearly had many positive effects on economic fundamentals, they have also, unfortunately, resulted in layoffs, which have slowed the decline in unemployment following the recession.

As we move closer to the next millennium, the federal government and many provincial governments have balanced their budgets, interest rates have dropped and business confidence has rebounded, leading to a surge in investment. These conditions have traditionally led to job growth. However, the employment levels have only recently begun to show signs of growth. Employers are demanding new skill sets and work arrangements from the work force and are increasingly looking outside Canada to find people with the skills they need to compete in the global marketplace. Growing pressures from global competition coupled with the 1990-91 recession, therefore, resulted in an increasingly competitive job market, which has characterized the 1990's.

At the same time, many people are leaving or delaying their entrance into the labour force to enroll in educational institutions in order to acquire the skills/training they need to improve their chances of obtaining a well-paying job. Moreover, the incidence of multiple job holders is on the rise for a variety of social and economic reasons, and this is exacerbating the competitive pressures in job markets.

A better understanding of these patterns is necessary in order to interpret their impacts on the jobs of the future, including employment in the agri-food chain.

## PURPOSE OF THE STUDY

In 1995, an inter-branch working group was set up to study employment trends in Canada's agri-food chain, and to resolve issues concerning inconsistent and sometimes contradictory information on employment levels being reported for the agri-food sector. The result was a working paper entitled "A Profile of Employment in the Agri-Food Sector" (Working Paper 1-97). The present working paper updates

that earlier paper, providing baseline information on employment in the agri-food chain and its industries, with updated figures for 1996 and 1997.

Employment patterns are identified across regions by age, gender, full time/part time employment and compared across different sectors of the economy and industries of the agri-food chain.

The study is organized into seven major sections. The first focuses on general employment patterns in Canada; the second compares employment patterns across sectors; the third describes employment patterns in the agri-food chain; the fourth looks at full time and part time employment patterns; the fifth explores employment patterns by province; the sixth describes employment patterns by age cohort; the seventh examines differences in employment patterns by gender. The report ends with a summary of findings and a final section which looks at issues for further research.

As in the earlier paper, employment patterns are examined over three periods, each defined by the characteristics which describe the Canadian economy during that period. The first period covers 1984-1990 and is characterized by economic growth and expansion. The second period is characterized by recession and minimal economic growth, beginning in 1990 and continuing well into 1992. The third period, the focus of this study, is between 1993 to 1997, and covers the recovery period which began to take hold as the Canadian economy strengthened.

At the end of the study, there is an appendix containing the tables referenced in this study.

## **THE DATA**

The main source of data used in this profile is the Labour Force Survey (LFS). The LFS is a household survey with a sample base of approximately 53,000 Canadian households. It is conducted by Statistics Canada on a monthly basis, and is used regularly by the Department of Human Resources Development and Statistics Canada to report on national trends in the labour force, including employment and unemployment levels.

Within the LFS, employed individuals are defined as those who, during the reference week, did any work at all or had a job but were not at work due to illness or disability, personal or family responsibilities, bad weather, vacation, etc. LFS employment figures refer to paid labour, self-employment and unpaid family labour (important in agriculture), and include both full time and part time employment. In

addition, the LFS provides information on main and secondary occupations. In this study, employment includes only main occupations.

As with all data sources, the LFS does have shortcomings, especially when used to analyze employment in a specific industry. The LFS is designed to provide information on employment in broad sectors of the Canadian economy. Consequently, information derived from the LFS may provide employment patterns in individual agri-food industries that may differ from those obtained from other, more industry-specific data sources.

It is important to acknowledge that there are other sources for much of the information contained in this study and other sources should be considered when exploring employment in detail in the agri-food chain.

## DEFINITIONS

### i. Employment/Unemployment

***Working Age Population:*** the number of Canadians age 15 and over, or those Canadians considered eligible for employment.

***Labour Force:*** the number of Canadians who are either employed or unemployed but actively searching for a job.

***Labour Force Participation Rate:*** the proportion of the working age population that is part of the labour force.

***The Unemployment Rate:*** the number of Canadians who are not employed but are actively searching for a job, expressed as a percentage of the labour force.

### ii. The Agri-Food Chain

For the purposes of this study, the agri-food chain is defined as including:

***Agriculture:*** includes employment in farming, ranching and related agricultural industries and services incidental to agriculture (except in the age cohort analysis where agriculture excludes employment in incidental services).

***Agri-Food Processing:*** includes employment in food processing, beverage processing and tobacco processing industries.

***Food Wholesale:*** includes employment in the grain elevator industry, wholesale farm products (grain, livestock, etc.), food wholesale, beverages wholesale, tobacco products wholesale.

***Food Retail:*** includes employment in food, liquor, wine and beer stores.

***Food Services:*** includes employment in restaurants, taverns, bars and night clubs.

iii. Other Definitions

***1984-1990:*** Expansion period.

***1990-1992:*** Slow economic activity.

***1993-Present:*** Recovery and improved economic growth.

***T.C.O.U.:*** transportation, communication and other utilities.

***Other Natural Resources:*** includes employment in all primary resource sectors including mining, forestry, fishing, etc., excluding employment in the agriculture sector.

***Other Manufacturing:*** includes employment in all manufacturing sectors excluding food processing, beverage processing and tobacco processing.

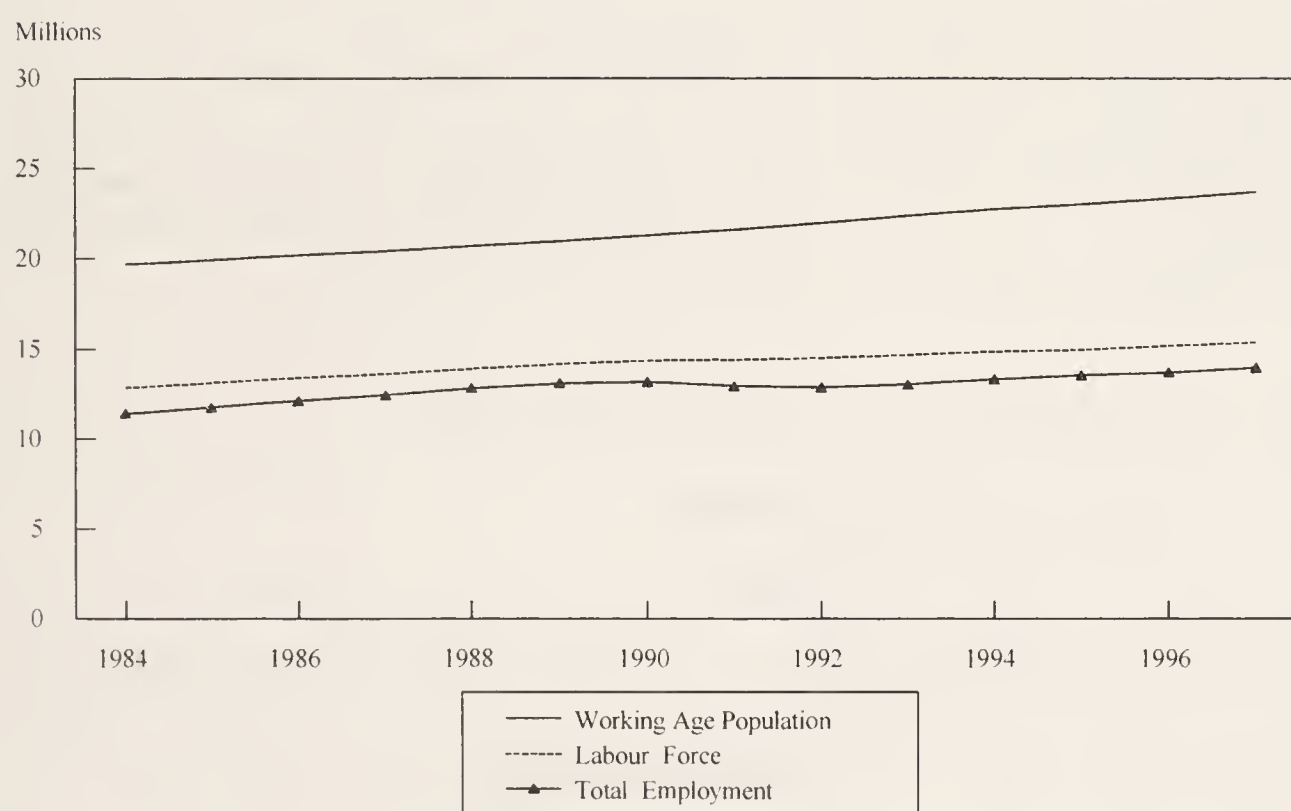
***Other Wholesale and Retail Trade:*** includes employment in all retail and wholesale trade sectors excluding food retail and food wholesale.

***Other Services:*** includes employment in all service sectors excluding food service by restaurants, caterers, and taverns.

## I. EMPLOYMENT IN CANADA

The Canadian working age population has increased steadily over the last 13 years at 1.4% per year, growing 20% from 1984 to 1997. In this same period, the labour force increased at a slightly slower rate, growing by 19% over the same period. In 1997, 15.4 million Canadians made up the labour force compared to 12.9 million in 1984 (**Graph 1**).

**GRAPH 1: Working Age Population, Labour Force and Total Employment in Canada**



Source: Labour Force Survey.

From 1984 to 1990 employment in Canada grew from 11.4 million to 13.2 million. Employment levels peaked in 1990 and then declined during the recession of 1990-1991. By the end of 1992, employment had declined to 12.8 million and the unemployment rate had risen from 8.1% in 1990 to 11.3% (Table 1).

Post-recession improvement in the economy started in 1993. Employment grew at an average annual rate of 1.7% from 1993 to 1997. By the end of 1994, employment had grown to 13.3 million, exceeding pre-recession levels. Since then, employment

has continued to rise, totalling more than 13.9 million by the end of 1997. Though the number of employed Canadians has surpassed pre-recessionary levels, the number of Canadians searching for employment remains 33% higher than in 1989.

The number of Canadians considered unemployed has dropped since 1993, falling 230,000 in just four years, representing an average annual decline of 3.7%. The unemployment rate has declined from 11.2% to just 9.2% in 1997, a decrease of two full percentage points.

Though there has been a decline in the unemployment rate in recent years, not all of it can be attributed to increased employment. Some of it can be traced back to a decline in labour force participation, as many Canadians who were searching for a job, stopped looking for work and therefore were no longer considered part of the labour force. Many left the labour force discouraged by poor job prospects while others delayed their entry into the labour force to acquire training and/or education in the hope of improving their employment opportunities when they returned to the labour market. As a result, the labour force participation rate has declined steadily since its peak in 1989 of 67.5%, falling to only 64.8% in 1997.

## **II. CANADIAN EMPLOYMENT BY SECTOR**

### **i. Trends between 1984 and 1990**

Employment generally grew in all sectors of the economy from 1984 to 1990, with the exception of agriculture (Table 2). The service sector provided Canadians with the most jobs in 1990, followed by the wholesale and retail sector and the manufacturing sector. Construction and other natural resource industries (excluding agriculture) employed the fewest people in 1990.

### **ii. Trends between 1990 and 1992**

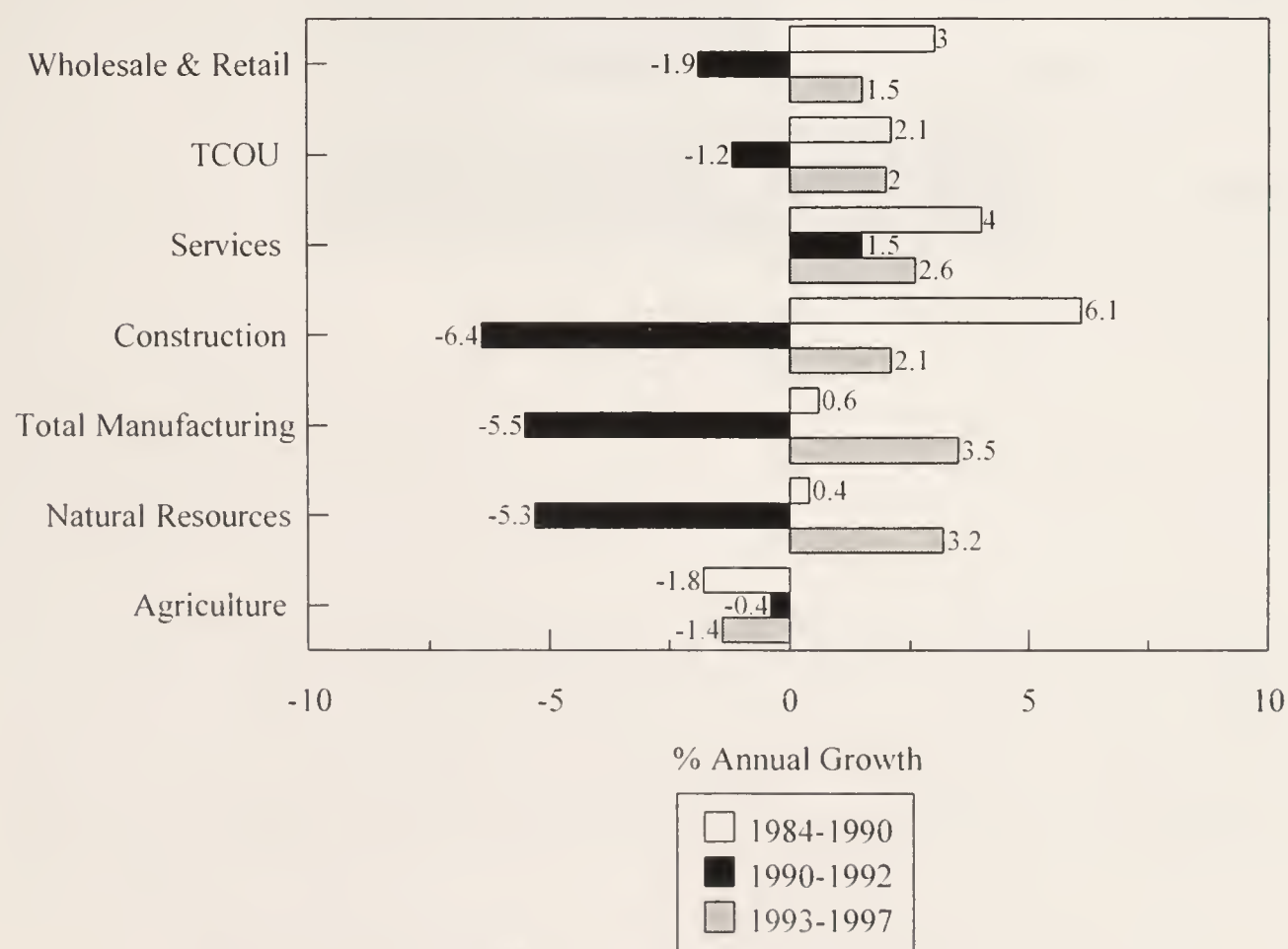
During the recession, employment in all sectors declined with the exception of the service sector, where employment grew by 134,000. By 1992, the service sector provided 4.6 million Canadians with employment and accounted for 36% of all jobs. Employment levels in the manufacturing sector, on the other hand, fell by more than 220,000 between 1990 and 1992, declining more than any other sector during this period.

iii. Trends between 1993 and 1997

Employment increased in most sectors of the Canadian economy from 1993 to 1997. Total employment grew at an average rate of 1.7% per year. The fastest growing sector was manufacturing, growing at 3.5% per year, followed by other natural resources, which grew at 3.2% per year. The slowest growth sector during this period was the wholesale and retail sector at 1.5% per year. Employment in most sectors of the economy remained below their pre-recessionary levels in 1997. The exceptions were the transportation, communications and other utilities sector, the wholesale and retail sector and the services sector, where employment levels have surpassed their pre-recessionary levels.

The service sector continued to provide the most jobs for Canadians, employing 5.3 million in 1997 (**Graph 2**) or over 38% of total employment. The wholesale and retail sectors followed, providing jobs for 2.4 million people, while the manufacturing sector employed nearly 2.2 million. Construction and other natural resources provided Canadians with the fewest jobs.

**GRAPH 2: Average Annual Employment Growth by Sector**



Source: Labour Force Survey.

iv. Overall Trends between 1984 and 1997

Though there were annual fluctuations in most sectors, employment levels were generally higher in 1997 than in 1984 across all sectors. The service sector showed the most consistent growth in employment between 1984 and 1997. Only agriculture posted negative growth during this period, with employment levels in this sector declining by 68,000 between 1984 and 1997. This decline is consistent with the decline in the number of farms which, according to the Census of Agriculture, fell by 18,134 from 1986 to 1996.

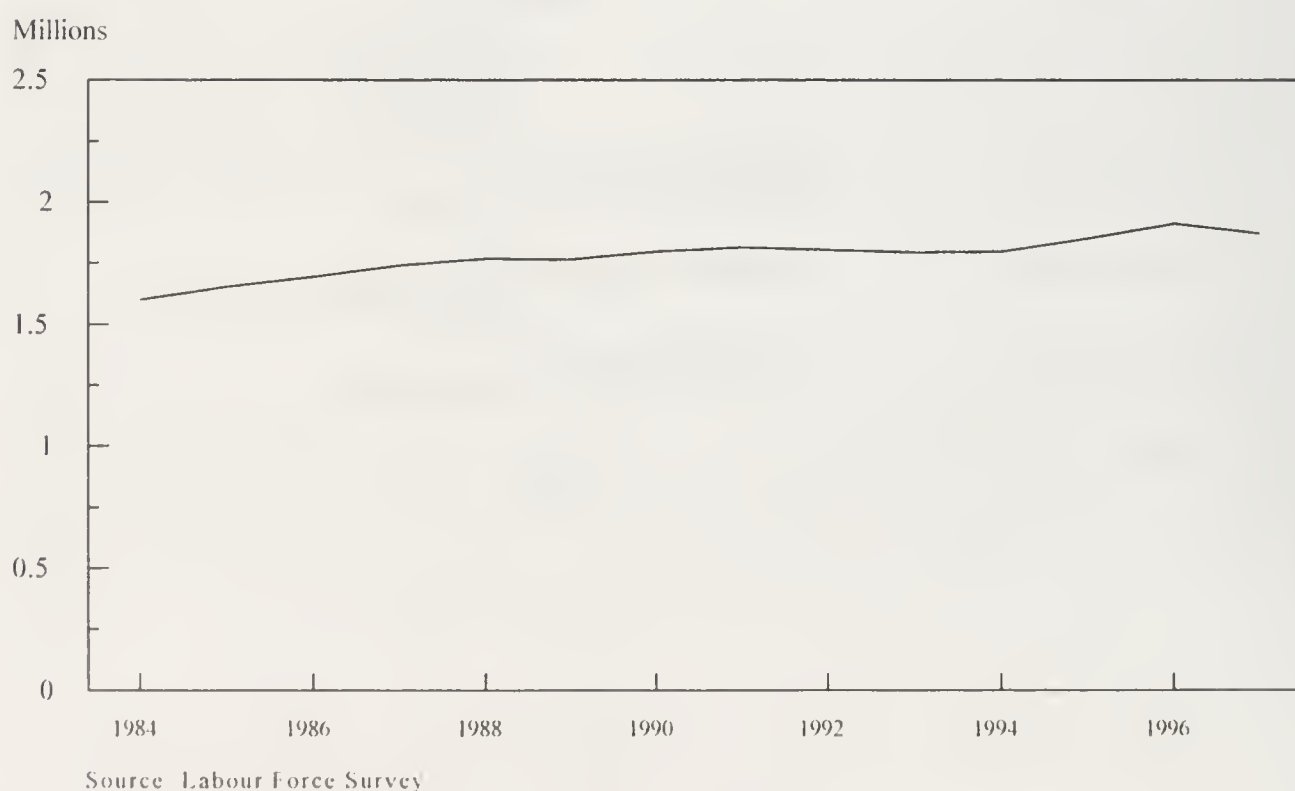
### III. EMPLOYMENT IN THE AGRI-FOOD CHAIN

i. Agri-Food Chain Employment

The agri-food chain is composed of five industries: agriculture, agri-food processing (food, beverage and tobacco processing), food wholesale, food retail, and food services (Table 3).

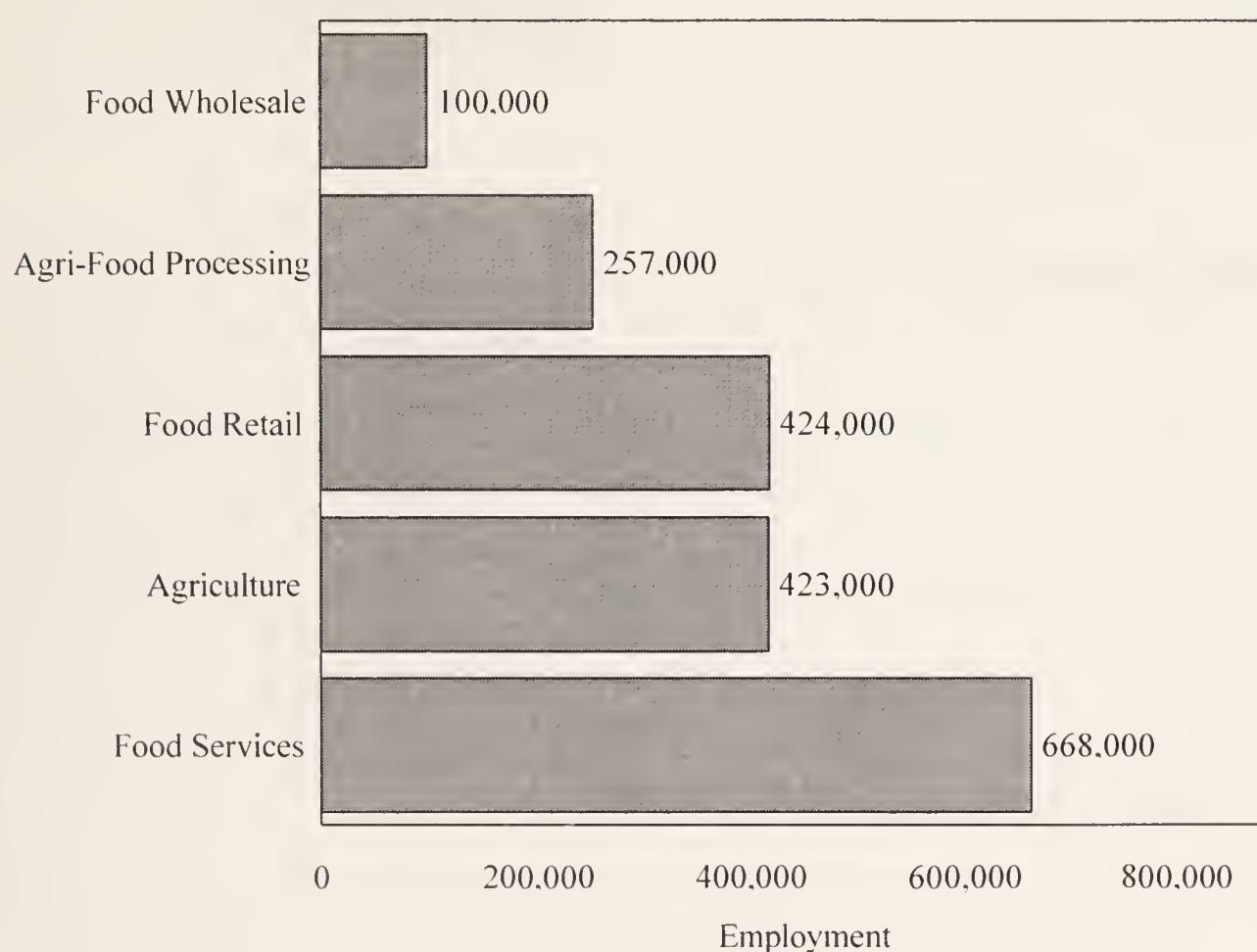
Employment in the agri-food chain as an aggregate has grown by nearly 270,000 since 1984, totalling more than 1.8 million and accounting for 13.4% of total employment in 1997 (**Graph 3**). Food services is the largest employer in the agri-

**GRAPH 3: Total Employment in the Agri-Food Chain**



food chain, accounting for 36% of total chain employment in 1997 (**Graph 4**). Food retail and agriculture supply roughly the same number of jobs, each accounting for 23% of total agri-food employment. Agri-food processing accounted for 14% of total agri-food employment. Food wholesale provided the least employment in the agri-food chain in 1997, accounting for 5% of agri-food employment.

**GRAPH 4: Employment Levels in Agri-Food Sub-Sectors, 1997**



Source: Labour Force Survey.

From 1984 to 1990, employment in the agri-food chain grew at an average annual rate of 2%, slightly slower than the 2.4% rate for total employment in Canada (**Graph 5**). While employment growth in agri-food exceeded growth in other natural resource sectors and the non-food manufacturing sector, it lagged behind employment growth in the non-food service and non-food retail and wholesale sectors during this period.

**GRAPH 5: Average Annual Employment Growth  
in the Agri-Food Chain Vs. the Total Economy**



Source: Labour Force Survey.

Employment levels in the agri-food chain remained relatively constant from 1990 to 1992, while employment in the rest of the economy fell by 323,000. Fuelled mainly by a growth in employment in food services, the share of total employment accounted for by agri-food increased from 13% to 14% by 1992. The only other sector to experience a growth in employment during this period was the service sector (excluding food services) which grew by 119,000.

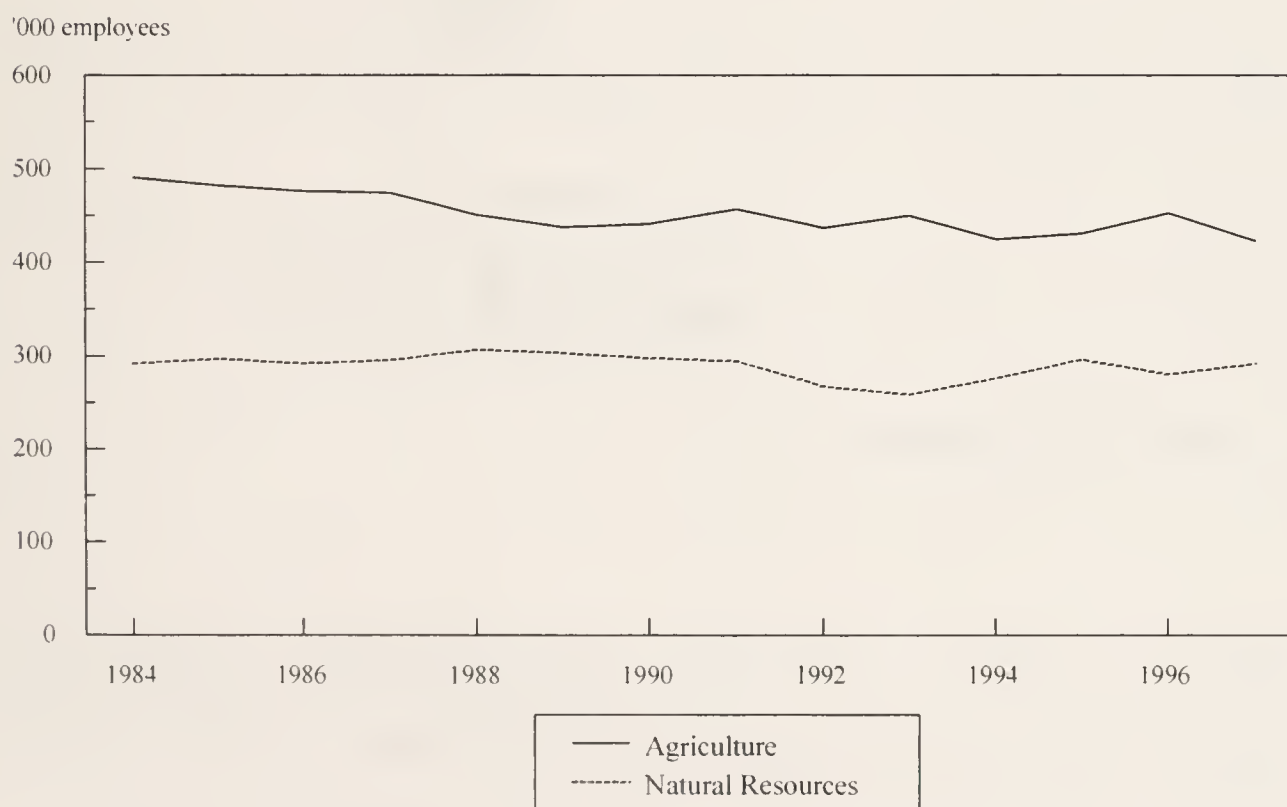
The recovery from the recession took hold in 1993 and the economy as a whole improved. From 1993 to 1997, employment in the agri-food chain grew by 76,000. However, the rate of employment growth in the chain did not quite match that of the overall economy during this period. As a result, the agri-food share of total employment fell from 14% in 1993 to 13.4% in 1997.

Overall, employment in agri-food generally grew between 1984 and 1997. Any declines during this period were slight, even during the 1990-91 recession. Employment in the chain generally grew at a slower pace in good economic times which is partially a function of the fact that employment levels declined at a slower pace during hard economic times. Thus the sector is comparatively recession proof.

## ii. Agriculture

In 1997, employment in agriculture accounted for 3% of total employment, providing 423,000 Canadians with jobs. Other natural resource sectors, on the other hand, accounted for 2.1% of employment, providing 292,000 jobs in 1997 (**Graph 6**).

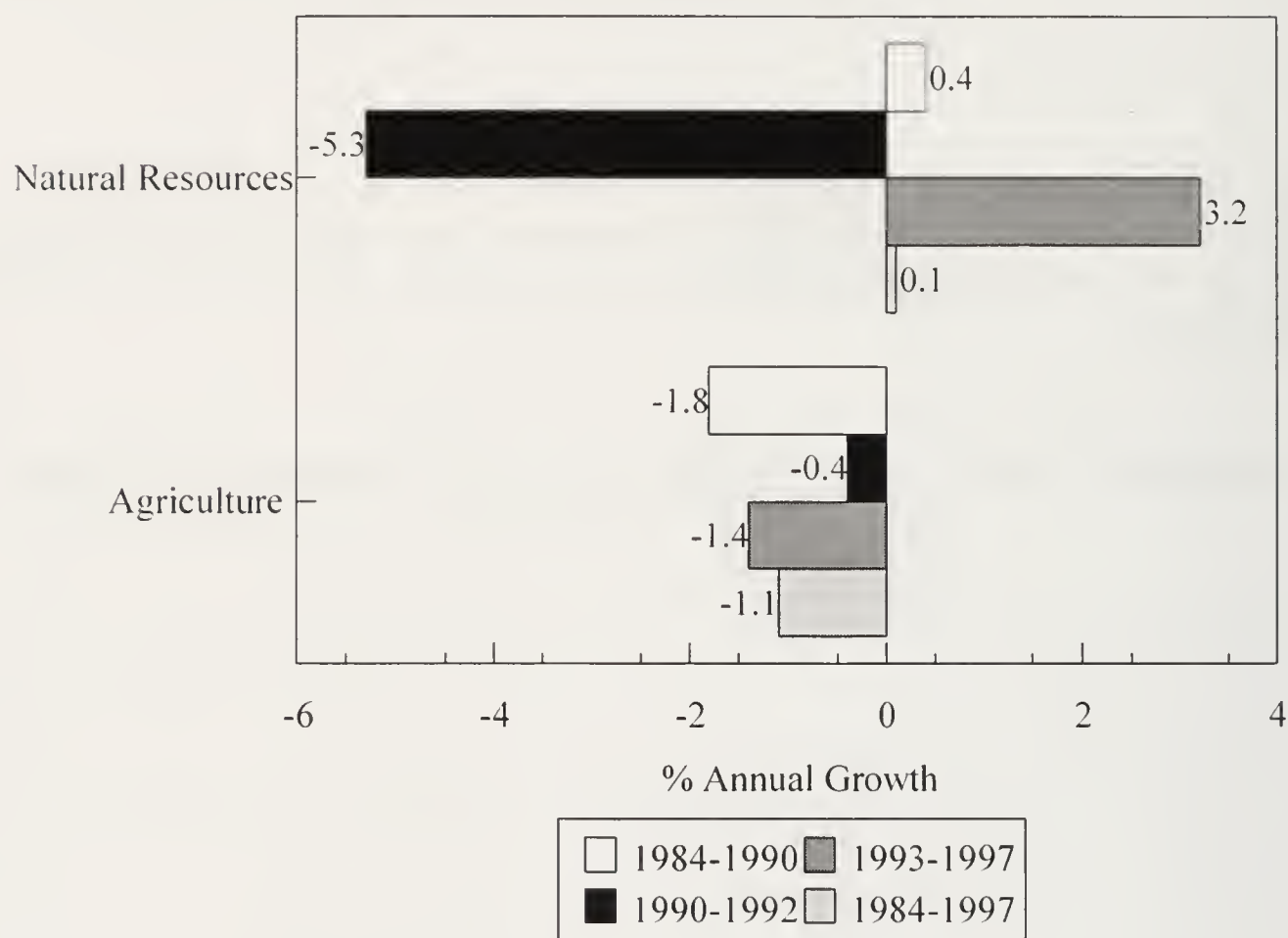
**GRAPH 6: Employment in Agriculture Vs. Other Natural Resource Sectors (Excluding Agriculture)**



Source: Labour Force Survey

Employment in agriculture generally declined between 1984 and 1990, registering a net loss of 50,000 employees (**Graph 7**). Employment in other natural resource sectors grew from 292,000 in 1984 to 307,000 in 1988 but declined to 298,000 by 1990 (Table 4).

**GRAPH 7: Average Annual Employment Growth,  
Agriculture Vs. Natural Resource Sectors (Excluding Agriculture)**



Source: Labour Force Survey.

Between 1993 and 1997, employment in agriculture fluctuated. Agriculture lost 25,000 jobs from 1993 to 1994 but gained these back by 1996, when it employed 453,000 Canadians. The increase, however, did not last. In 1997 the number dropped to 423,000, below the 1994 level.

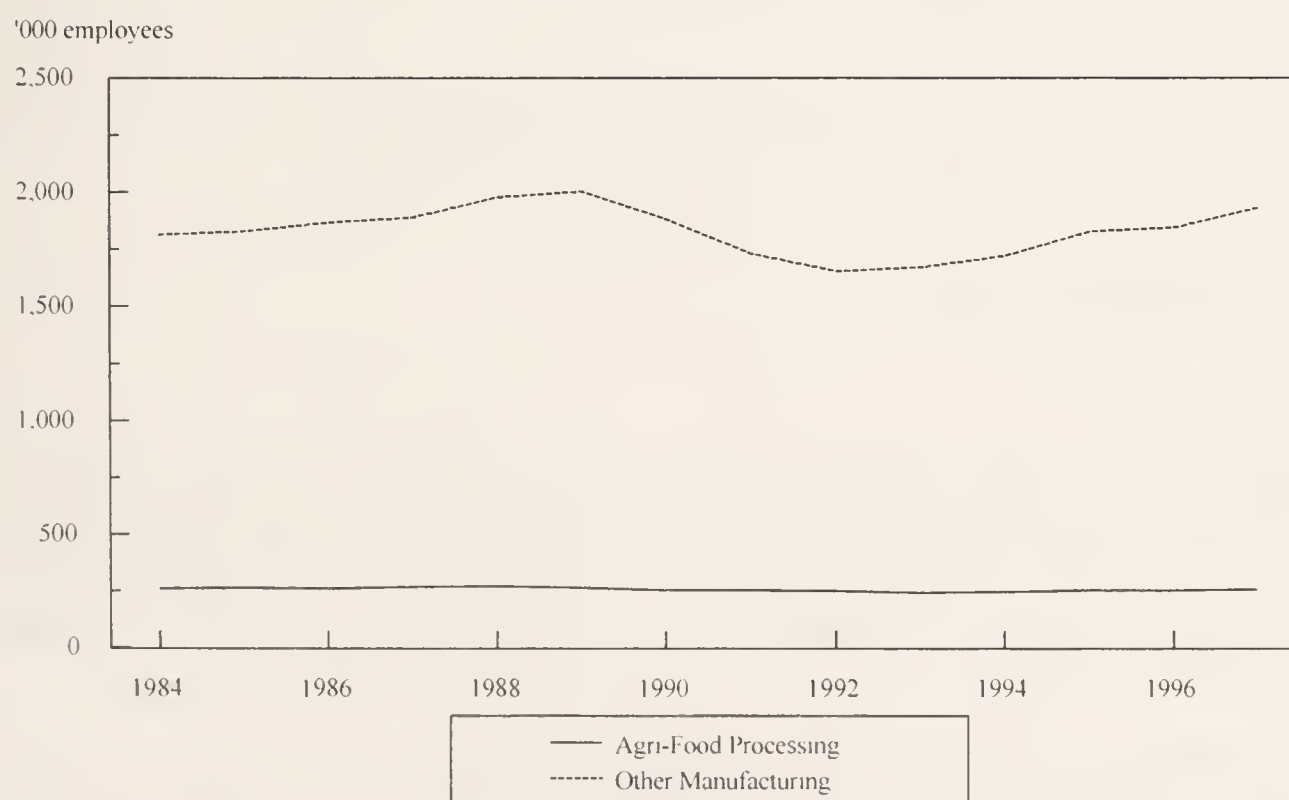
A large part of the decline in agriculture employment between 1984 to 1997 can be attributed to a decline in the level of unpaid family labour in the industry during this period. In 1984, unpaid family labour accounted for 16% for agriculture employment or 77,600 people. Since then, there has been a dramatic decline in unpaid family labour, falling by more than 48,000 to 28,800 in 1997. Unpaid family labour now accounts for 7% of employment in the industry. By contrast, paid labour

in agriculture has remained relatively unchanged from 1984 to 1997. The decline in the level of unpaid family labour, therefore, accounted for more than 70% of the decrease in agriculture employment during this period. The remaining 30% can be partially attributed to the decline in the number of farms, and thus farm operators, over this period.

### iii. Agri-Food Processing

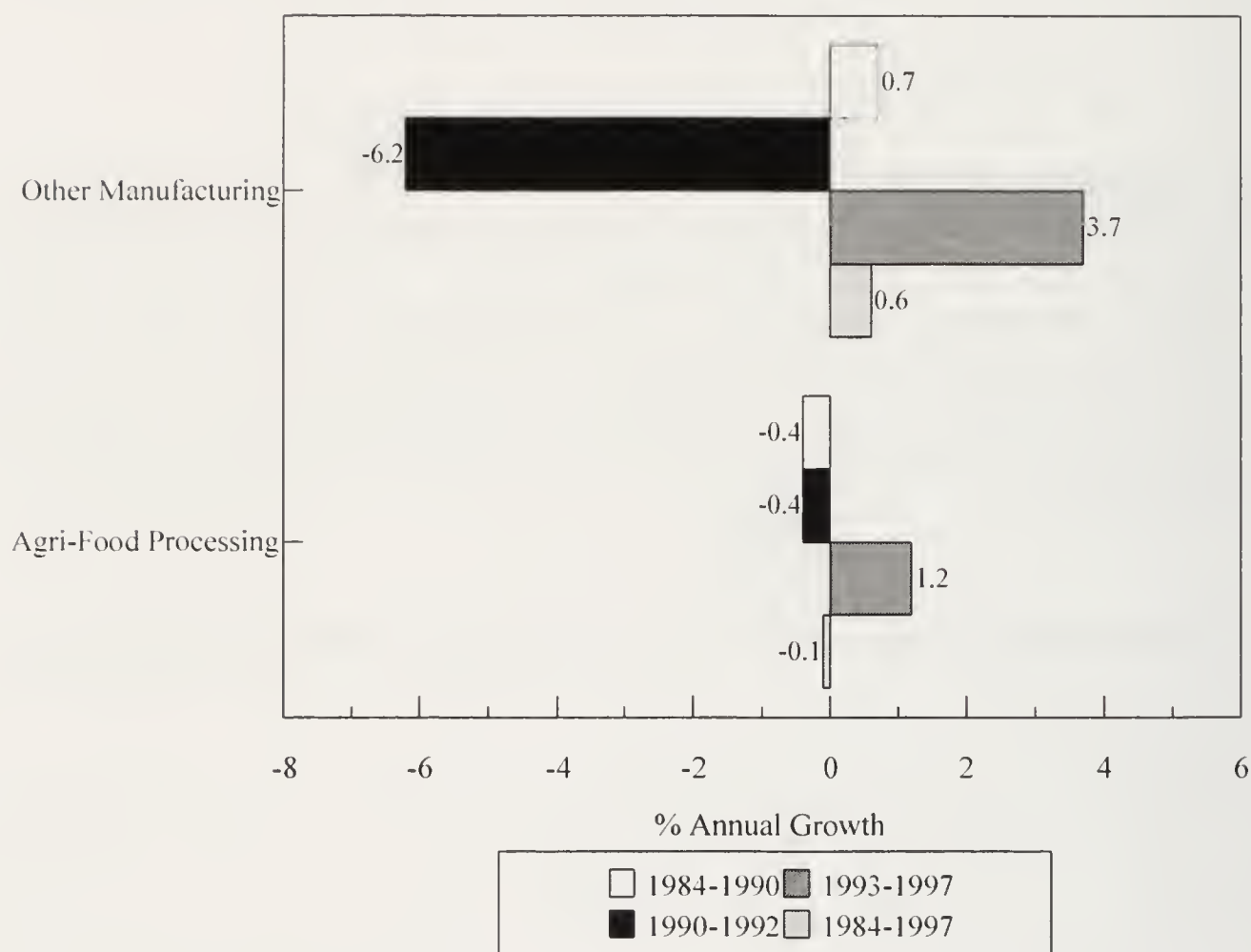
In 1997, agri-food processing (food, beverage and tobacco processing) employed 257,000 Canadians and accounted for 1.8% of total employment. Employment in agri-food processing has fluctuated slightly from year to year but has remained relatively unchanged over the last 13 years (**Graph 8**). From 1984 to 1988, employment in agri-food processing grew from 260,000 to 273,000 but then declined to 254,000 by 1990. This compares to other manufacturing sectors that grew 189,000 from 1984 to 1989 and then fell 121,000 to less than 1.9 million by 1990 (**Graph 9**).

**GRAPH 8: Employment in Agri-Food Processing Vs. Other Manufacturing**



Source: Labour Force Survey

**GRAPH 9: Average Annual Employment Growth,  
Agri-Food Processing Vs. Other Manufacturing**



Source: Labour Force Survey.

From 1990 to 1992, agri-food processing employment remained relatively unchanged. In fact, during the recessionary period, agri-food processing declined by only 0.8%, from 254,000 in 1990 to 252,000 in 1992. On the other hand employment in other manufacturing sectors fell by more than 200,000 to less than 1.7 million in 1992.

From 1993 to 1997, employment in agri-food processing grew at a rate of 1.2% per annum, compared to other manufacturing sectors which grew at a rate of 3.7% per annum. By 1997, agri-food processing employed 257,000 people, an increase of 12,000 over employment levels in 1993. Employment levels in this industry have changed very little over the last three years.

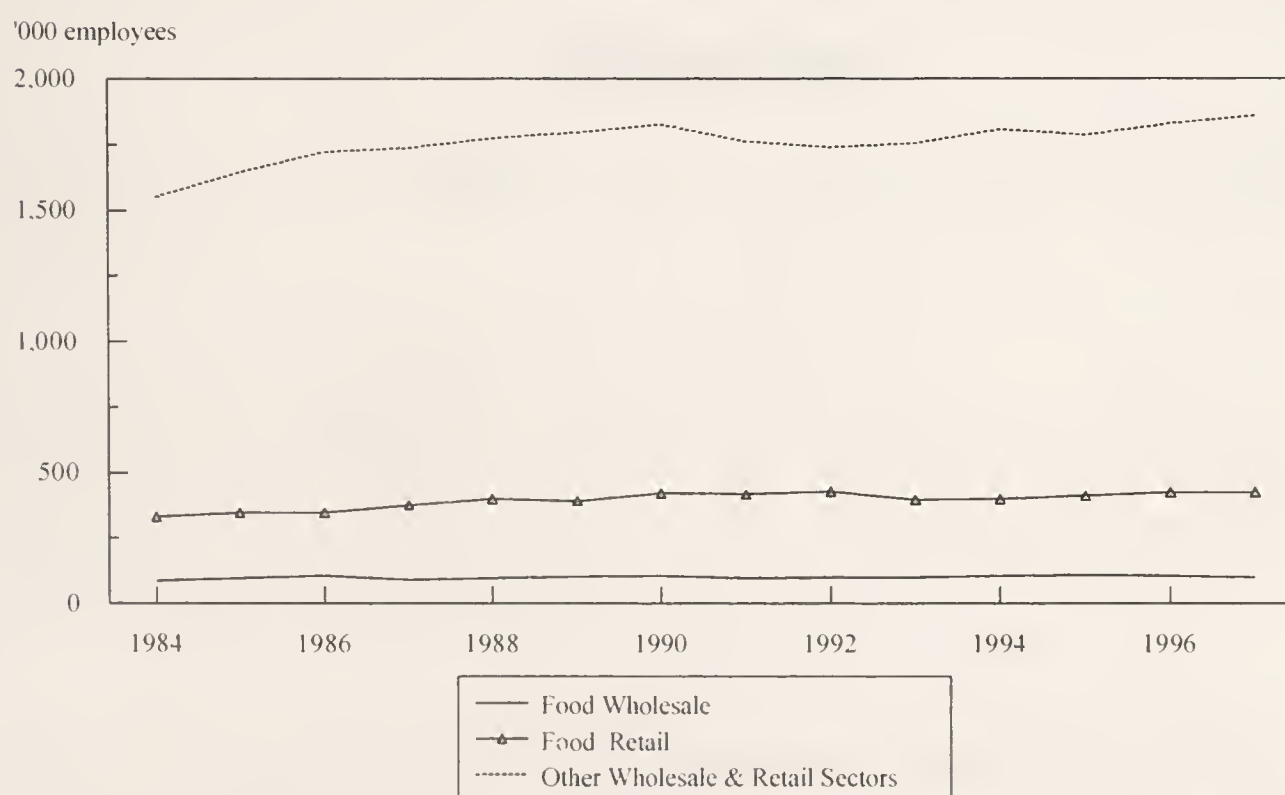
Over the entire period from 1984 to 1997, the agri-food processing industry registered a small net employment loss of 3,000, despite yearly fluctuations. In other manufacturing sectors, employment reached its highest level in 1989, and dropped sharply afterward, through to 1992. After 1992, there was a slow recovery and by the end of 1997, employment levels were almost as high as in 1989.

Though employment levels in agri-food processing have changed little since 1984, production levels in the industry have grown, suggesting improved labour productivity in the industry. It is, however, uncertain what changes in the industry are driving this increase in productivity (new management systems, new technology, etc.).

#### iv. Food Wholesale

The food wholesale sector employed 100,000 Canadians in 1997 and accounted for slightly less than 1% of total employment in Canada (**Graph 10**).

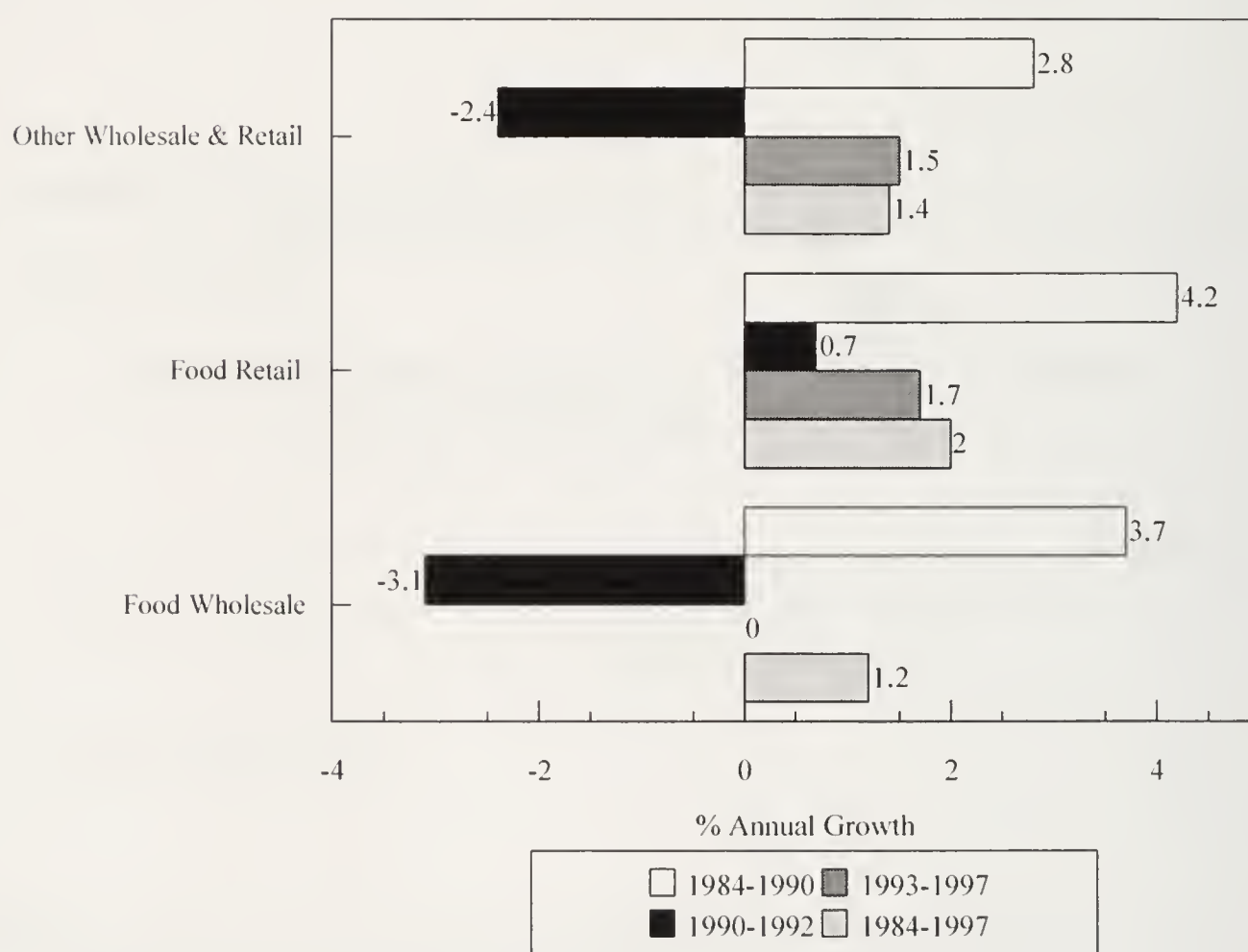
**GRAPH 10: *Employment in Food Retail, Food Wholesale and Other Wholesale and Retail Sectors***



Source: Labour Force Survey

From 1984 to 1990, employment fluctuated slightly but grew at an average annual rate of 3.7% , totalling 107,000 by 1990 (**Graph 11**). This growth rate was greater than the 2.8% annual growth rate that characterized other wholesale and retail sectors in Canada during this period.

**GRAPH 11: Average Annual Employment Growth in Food Retail, Food Wholesale and Other Wholesale and Retail Sectors**



Source: Labour Force Survey.

From 1990 to 1991, employment fell 11,000 to 96,000, but then grew to 100,000 by 1992. Employment in other wholesale and retail sector experienced a similar decline as employment fell by 88,000 from 1990 to 1992, mostly due to the 1990-1991 recession.

Since 1993, employment levels in food wholesale have increased from 100,000 in 1993 to 109,000 by 1995. This increase was offset by a decline in 1996 and 1997, bringing total employment in food wholesale down to 100,000 (the same as it was in 1993).

Overall, the employment level in food wholesale fluctuated from year to year but still managed a net gain of 12,000 jobs from 1984 to 1997.

v. Food Retail

Employment in food retail totalled 424,000 in 1997, accounting for 3.0% of total employment. Between 1984 and 1990, employment in the industry grew steadily from 331,000 to 421,000. This represents an average growth rate of 4.2% per year, a growth of 90,000 jobs over the period.

From 1990 to 1992, employment in food retail fluctuated due to the recession of 1990-91. The employment level declined by 4,000 to 417,000 in 1991 but increased to 427,000 in 1992. During this same period, employment in other wholesale and retail sectors fell nearly 88,000.

Employment in the food retail industry declined 30,000 from 1992 to 1993, but rebounded over the next four years. The total growth from 1993 to 1997 was 27,000, almost offsetting losses in 1993.

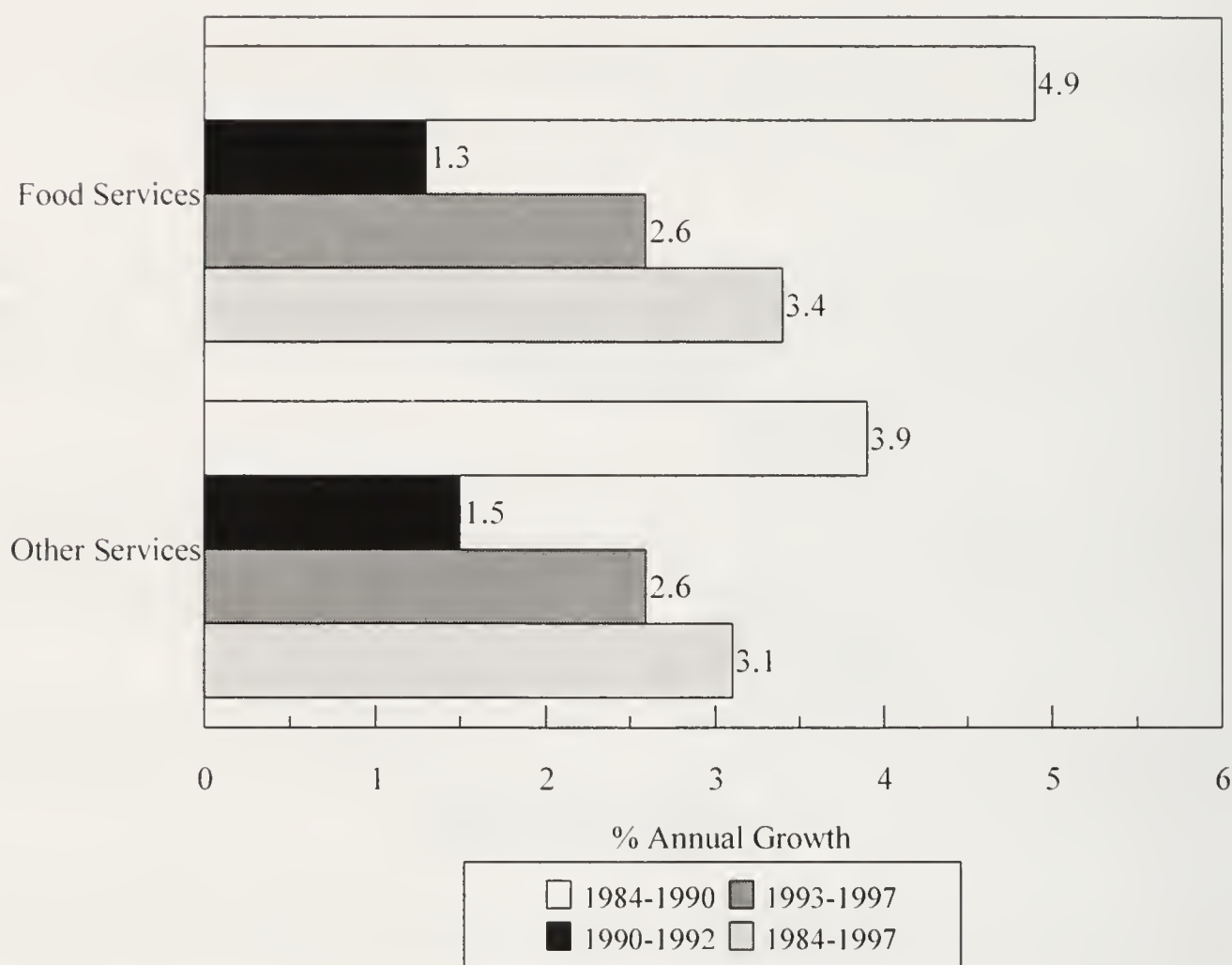
Overall, the food retail industry recorded a net gain of 77,000 from 1984 to 1997. The only other sector in agri-food to register a greater net gain during this period was food services.

vi. Food Services

The food service industry employed 668,000 Canadians in 1997, accounting for 4.8% of total employment. From 1984 to 1990, employment in the food service industry grew at an average annual rate of 4.9% from 432,000 to 575,000. Employment in other service sectors also grew, at an average rate of 3.9% per year, from 3.1 million to 3.9 million by 1990 (**Graph 12**).

From 1990 to 1992, as the Canadian economy was in a recession, both the food service industry and other service industries continued to grow, but at reduced annual rates of 1.3% and 1.5%, respectively.

**GRAPH 12: Average Annual Employment Growth,  
Food Services Vs. Other Services**



Source: Labour Force Survey.

From 1993 to 1997, the food service industry gained 65,000 jobs, at an annual average growth rate of 2.6%. This is the highest growth rate within the agri-food chain. The largest increases year to year were from 1994 to 1995 and from 1995 to 1996. For 1997, there was a slight decline in the employment level, the largest in the 13 year period covered by this study.

From 1984 to 1997, the food service sector has increased from 432,000 jobs to 668,000 (an increase of 55%) reflecting social and demographic factors which have led to a great increase in meals eaten outside the home. The net gain in employment was 236,000 at an annual growth rate of 3.4% over the 13 year period.

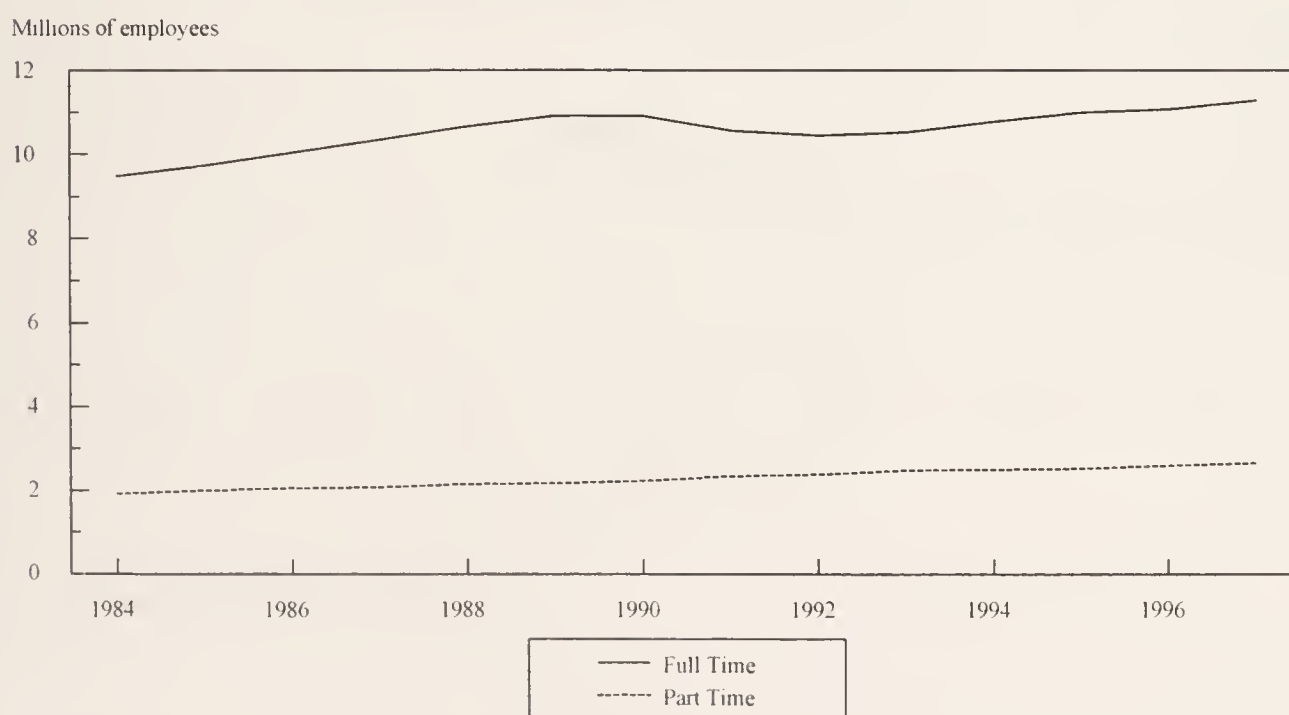
The conventional view is that most of these food services jobs are low wage, part time and low skill. That view is at best only partially true, and it can equally well be argued that this type of employment often provides valuable first job experience and plays an important role in the transition between school and full time, permanent participation in the labour force for many young Canadians.

#### IV. FULL TIME / PART TIME EMPLOYMENT

##### i. Canada

Since 1984, an increasing number of Canadians are working part time, growing from 1.9 million in 1984 to over 2.6 million in 1997. Part time employment accounted for 19% of total employment in Canada, in 1997 (Table 5). Full time employment also grew during this period, totalling over 11 million in 1997, 1.8 million more than in 1984 (**Graph 13**).

**GRAPH 13: Full Time / Part Time Employment in Canada, 1984 to 1997**



Source: Labour Force Survey

The service sector is the largest employer of both full time and part time labour, accounting for 34% of total full time employment and 55% of total part time employment. In 1997, the service sector provided over 3.8 million Canadians with

full time positions and almost 1.5 million with part time positions (Table 6). Twenty-eight percent of employment in the service sector is part time, the largest among the various sectors of the economy. By contrast, the manufacturing sector provides few part time jobs: only 5% percent of employment in this sector is part time.

## ii. The Agri-Food Chain

As in the rest of the economy, full time and part time employment in the agri-food chain grew since 1984. More than 132,000 full time jobs and 147,000 part time jobs created in agri-food chain between 1984 and 1997 (**Graph 14**).

**GRAPH 14: Full Time / Part Time Employment in the Agri-Food Chain, 1984 to 1997**

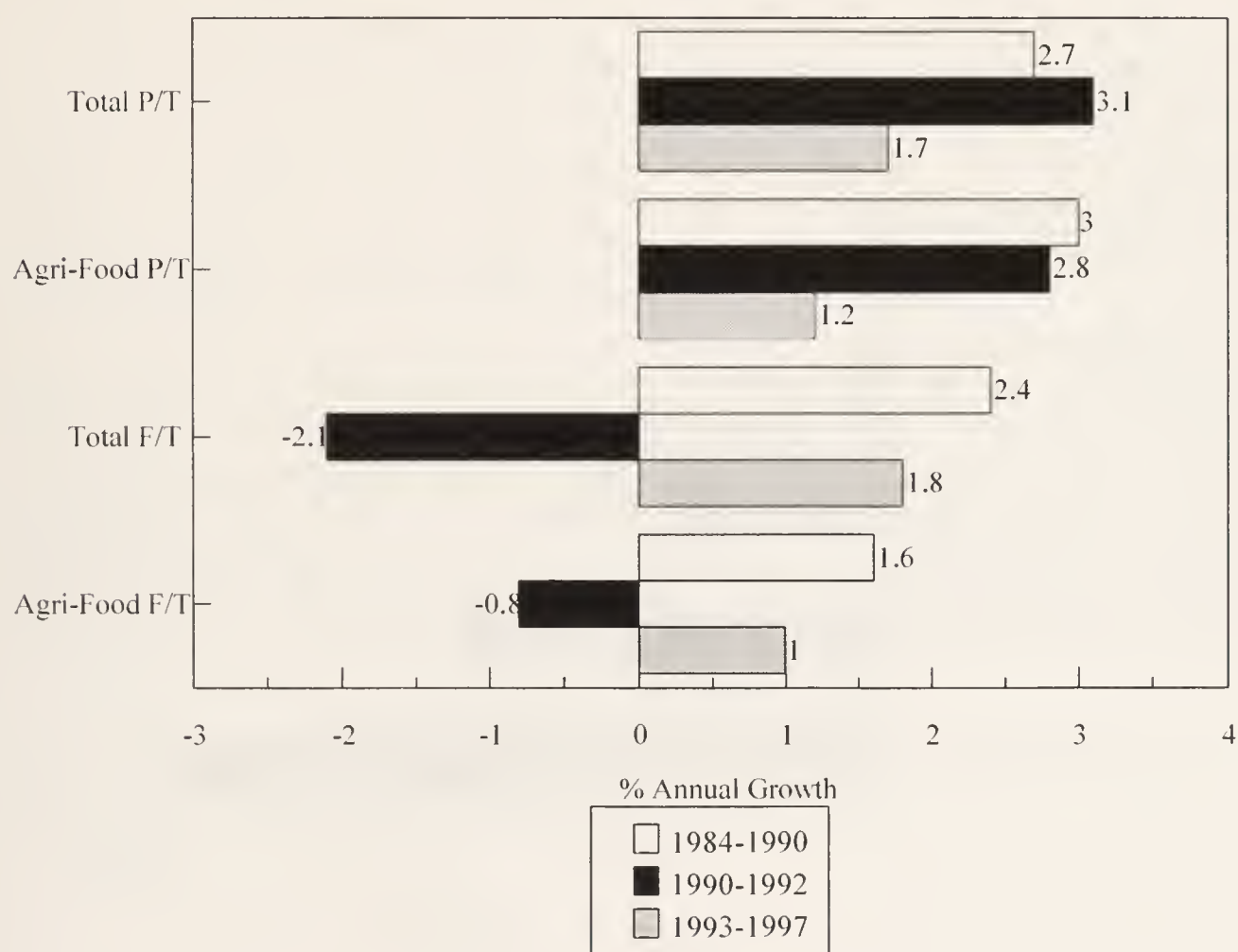


Source: Labour Force Survey

From 1984 to 1990, full time employment in the agri-food chain grew at a slower pace than full time employment in the total Canadian economy. Part time employment, on the other hand, grew at a faster pace in agri-food than in the rest of the Canadian economy (**Graph 15**). In 1997, 31% of employment in agri-food was part time compared to 27% in 1984.

Between 1990 and 1992, full time employment declined at an annual rate of 0.8%, while part time employment grew. The decline in full time employment was slower in agri-food than in the rest of the Canadian economy, as was the increase in part time jobs in the chain.

**GRAPH 15: Average Annual Full Time and Part Time Employment Growth in the Agri-Food Chain Vs. The Total Economy**



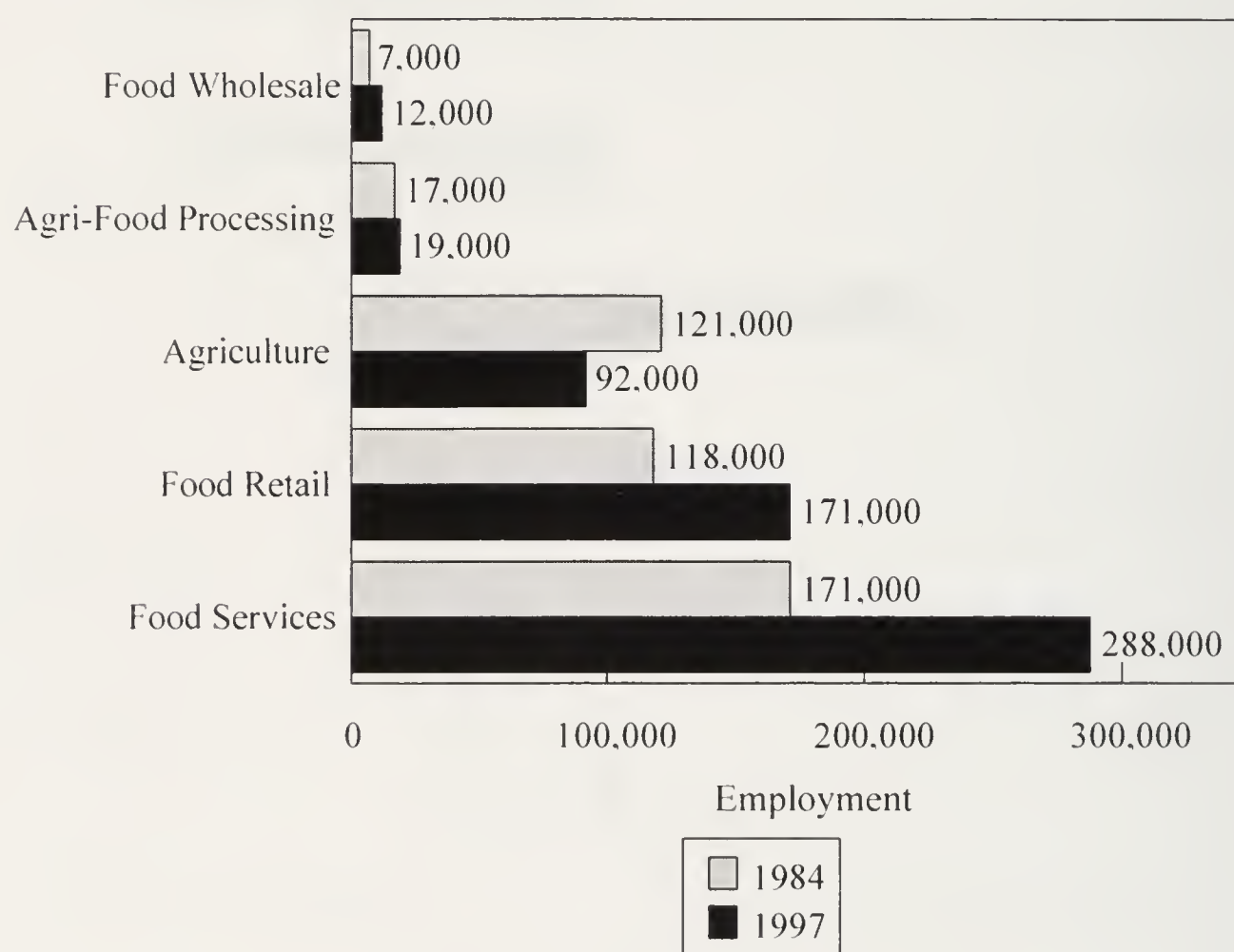
Source: Labour Force Survey.

Full time and part time employment in agri-food both grew from 1993 to 1996 while full time employment declined in 1997. The overall economy, on the other hand, saw a continual increase in both full time and part time employment over the entire period from 1993 to 1997.

Most of the increase in part time agri-food employment was in food service which employs 288,000 Canadians on a part time basis, making this industry the most

important supplier of part time positions in the agri-food chain (**Graph 16**). Forty-three percent of jobs in food service are part time. Food retail is the second largest part time employer in the agri-food chain (40% of jobs in the industry), while food wholesale (12%) and agri-food processing (8%) provide the least amount of part time jobs in the agri-food chain (Table 7). Part time employment generally increased across agri-food industries between 1984 and 1997, with the exception of agriculture where it fell 29,000.

**GRAPH 16: Part Time Employment Levels in Agri-Food Sub-Sectors**



Source: Labour Force Survey.

## V. EMPLOYMENT BY PROVINCE

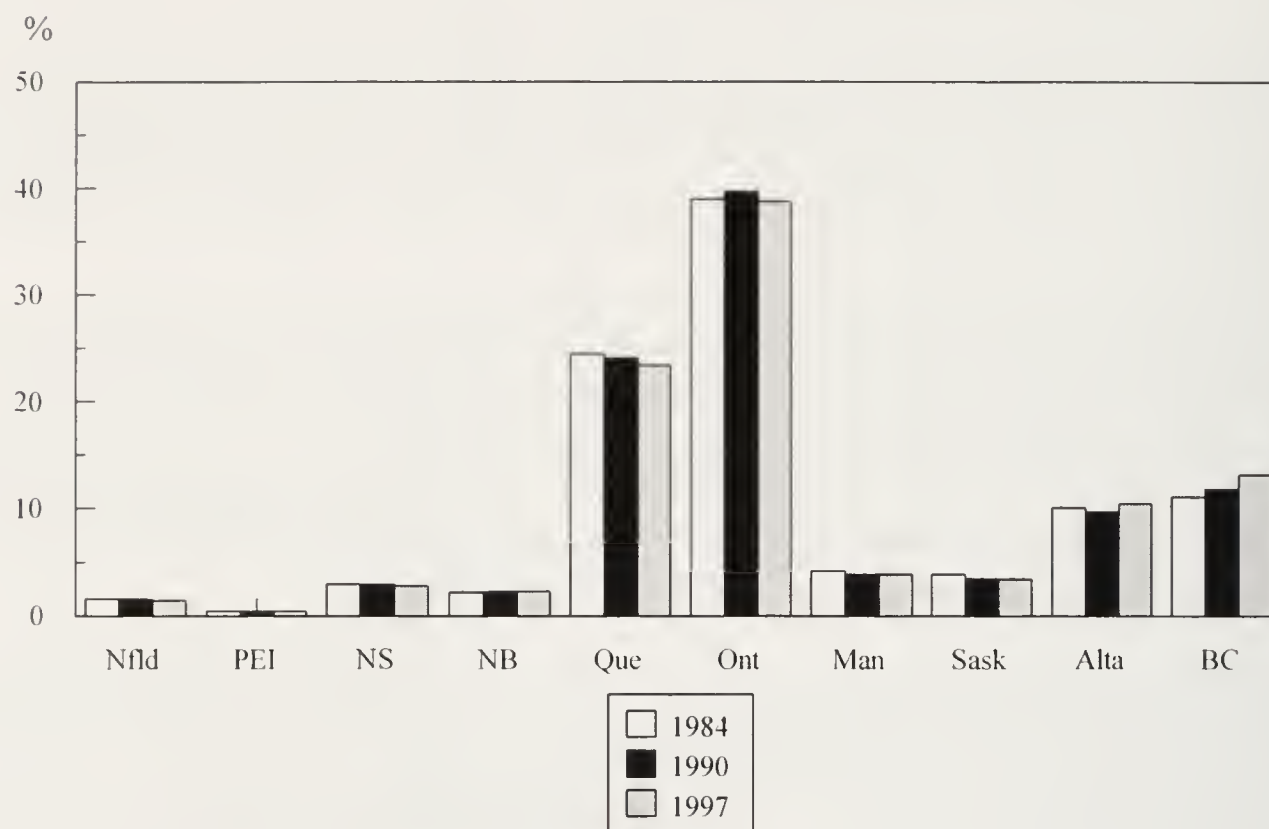
### i. Provincial Employment Levels

Employment levels in Canada vary by population levels in each province and region. Ontario and Quebec make up the largest portion of the total population in Canada and account for the greatest portion of employment. Together, employment in Quebec and Ontario comprise more than 60% of total employment in Canada (Table 8).

The Atlantic provinces (Newfoundland, Prince Edward Island, Nova Scotia and New Brunswick) have the lowest proportion of employment. As an aggregate, employment in the Atlantic provinces totalled 961,000 or 7% of total Canadian employment in 1997. Employment in the Prairies (Manitoba, Saskatchewan and Alberta) totalled 2.5 million or 18% of total employment. In British Columbia, employment levels reached 1.8 million or 13% of employment.

From 1984 to 1990, employment grew for all provinces with the greatest increases taking place in British Columbia and New Brunswick. From 1990 to 1992, employment declined in seven of the ten provinces, with New Brunswick, Alberta and British Columbia being the exceptions. Since 1993, employment levels in the four most populated provinces had the greatest growth. The rest of the provinces had relatively small increases or decreases in employment levels during this period (**Graph 17**).

**GRAPH 17: Employment by Province  
(Provincial Share of National Employment)**



Source: Labour Force Survey.

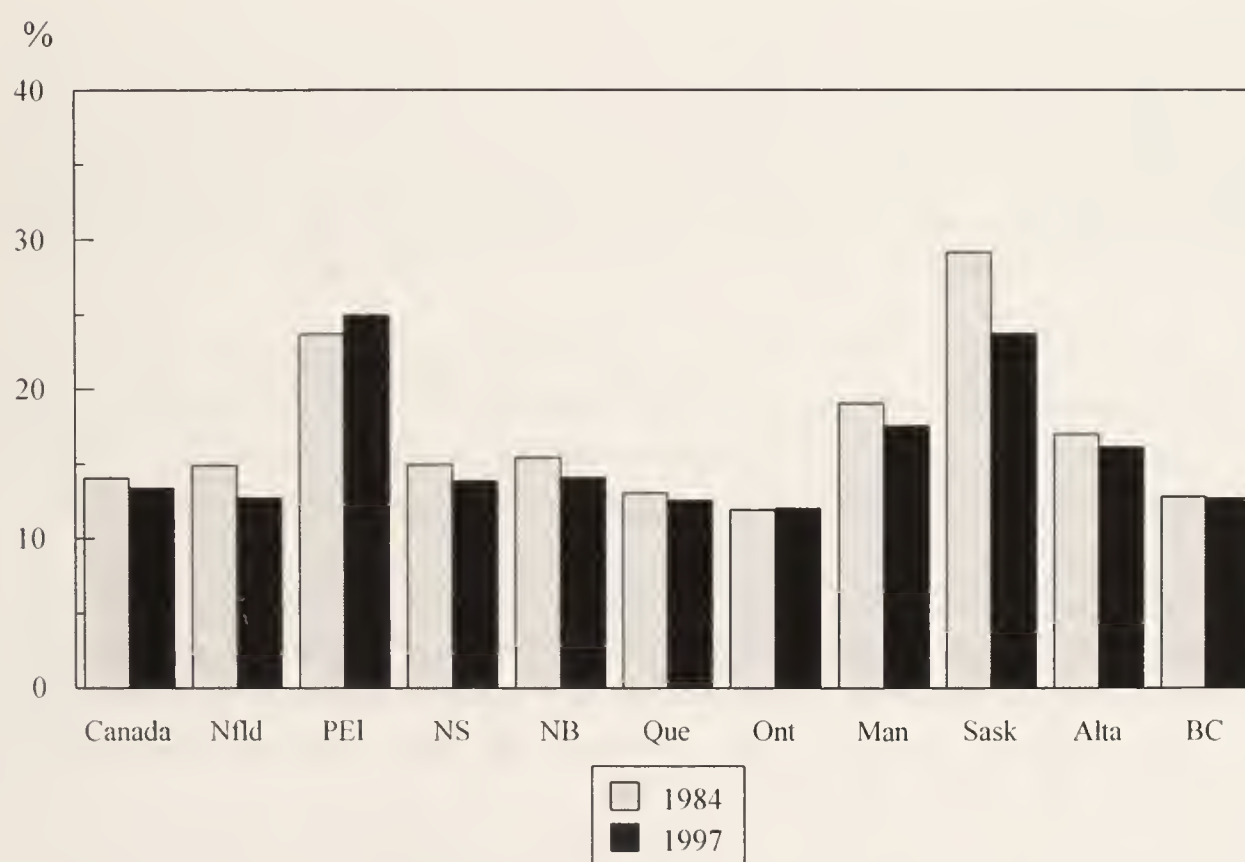
## ii. Agri-Food Employment

The agri-food chain is an important employer in all provinces, accounting for at least 12% of employment in each province. In Saskatchewan, the agri-food chain accounts for 122,000 jobs, or 26% of total employment for the province, while in Prince Edward Island and Manitoba, the agri-food chain accounts for 23% and 19% of provincial employment, respectively. In Quebec, British Columbia and Newfoundland the proportion is closer to 13% and in Ontario it is 12%.

Employment levels in the agri-food chain also vary with population levels across provinces and regions. Ontario and Quebec account for the largest proportion of employment in the agri-food chain, reflecting the large populations in these provinces. Ontario accounted for 36% of the agri-food chain employment while 23% of employment in agri-food was in Quebec. Agri-food employment in Manitoba, Saskatchewan and Alberta accounted for 25% of total agri-food employment, while agri-food industries in B.C. made up 13% of total agri-food employment. In the Atlantic provinces, 140,000 were employed in agri-food, making up almost 8% of total agri-food employment.

The relative importance of individual industries within the agri-food chain as employers also varies across provinces. In Ontario, Quebec and British Columbia, food service and food retail were the largest agri-food chain employers, reflecting the large population in these provinces. In Manitoba, Saskatchewan and Alberta, agriculture was the largest agri-food chain employer, reflective of the availability and quality of agricultural land in these provinces. In the Atlantic region, food service and food retail were the largest agri-food employers, reflecting the lack of agricultural land rather than population levels (**Graph 18**).

**GRAPH 18: Agri-Food Employment as a Share of Total Provincial Employment**



Source: Labour Force Survey.

## VI. EMPLOYMENT BY AGE

Age is an important factor in the employment status of all Canadians. The opportunities and obstacles Canada's youth (15-24 years) encounter in today's job market are different from those faced by older Canadians. Those aged 25-54, have unique considerations that affect their employment decisions while those 55 and over are either close to retirement or retired.

i. Youth Employment

Youth (15-24 years) employment in Canada has declined for more than a decade (Table 9). Since 1984, the number of employed youth dropped from over 2.5 million to just 2 million in 1997.

Not only were there fewer youth employed in 1997 than in 1984, but the number of hours per week they worked declined. In 1984, an average work week was 30.6 hours compared to only 27.8 hours in 1997. This decline in average working hours was partially the result of a decline in full time employment among youth, falling 36% over this period, while part time employment for this age group grew from 792,000 to 919,000 by 1997.

At the same time, fewer of Canada's youth are participating in the labour force. Many young Canadians, discouraged by the poor job market, are leaving the labour force to further their education and/or training in hopes of improving their prospects for employment. No longer considered unemployed, these youth are not counted in the labour force numbers. As a result, the unemployment rate reported for youth may, in fact, not reflect the true unemployment situation faced by today's youth.

The agri-food chain is one of the largest employers of youth in Canada (Table 10), providing employment to 553,000 young Canadians or 27% of employed youth. Fifty-four percent of youth employment in the agri-food chain is in food service where many are employed as waiters, waitresses and dishwashers.

Since 1984, youth employment in the agri-food chain has generally grown and agri-food has become an increasingly important supplier of jobs for Canadian youth. Most of this growth is from food service and food retail. In these industries, employment of 15-24 year olds increased while youth employment in the agriculture and agri-food processing industries declined.

Today, youth comprises 44% of total food service employment while accounting for only 16% of employment in agriculture and 14% of employment in agri-food processing.

Within agri-food the proportion of youth employed in the chain is declining. In 1984, youth comprised more than 33% of total employment in the sector but by 1997 this proportion declined to 30%.

“A Profile of Canadian Youth: Focus on the Agri-food Industry” (available from the Cross-Sectoral Policy Development Division of Policy Branch) provides a more detailed analysis of youth employment in the agri-food chain.

ii. Employment for ages 25-44

Of all employed Canadians, 55% are between the ages of 25 and 44, increasing from 51% in 1984 (Table 9). The number of employed Canadians, ages 25-44, has increased from 5.9 million in 1984 to 7.6 million in 1997. Employment declined slightly between 1990 and 1992, but recovered to pre-recessionary levels by 1995. Most of this increase was in the general service sector (excluding food service) which employed 2.5 million in 1997 (up from 1.7 million in 1984) and accounted for 33% of employment for Canadians within this group.

The agri-food chain accounts for 11% of total employment in this age group, employing 835,000 Canadians between the ages of 25 and 44 in 1997 (Table 11).

Employment levels within agri-food have grown by 34% for this age group since 1984. Today, almost 45% of those employed in the agri-food chain are between 25 and 44, up from 39% in 1984.

iii. Employment for ages 45-54

Canadians, 45-54, constitute 21% of total employment in Canada (Table 9). The service sector is again the largest employer, accounting for 37% of employment in this age bracket. From 1984 to 1997, the number employed nearly doubled from 1.7 million to 3 million, making up an increasing proportion of the employed labour force. Employment for this age category grew in all sectors but the biggest increase was in the service sector where employment more than doubled from 491,000 in 1984 to over 1.1 million in 1997.

In 1997, 285,000 Canadians, between the ages of 45 and 54, were employed in the agri-food chain, accounting for more than 9% of all employment for this age group (Table 12). Employees in this age category comprise 14% of total employment in the chain. Agriculture, food service and food retail are the largest suppliers of employment for this age group. Agri-food chain employment grew from 192,000 in 1984 to 279,000 by 1997.

iv. Employment for age 55 and over

Canadians, aged 55 and over account for 10% of total employment in Canada (Table 9). In 1997, more than 1.3 million Canadians in this age group were employed. Since 1984, this number has remained relatively constant. The service sector accounts for 37% of this group's employment, employing 474,000 in 1997. Employment in the service sector for this group grew from 1984 to 1997, whereas employment in manufacturing, retail and wholesale has declined.

More than 14% of employed Canadians in this age group are employed in the agri-food chain (Table 13). This age group makes up almost 11% of the total employment in agri-food. More than half work in agriculture. Since 1995, agri-food employment for this group declined from 111,000 to 107,000 in 1997. Those above the age of 55 now make up more than 25% of agriculture employment in Canada.

## VII. EMPLOYMENT BY GENDER

i. Total Employment

Women make up 51% of the working age population and 45% of the labour force. The number of women in the labour force has grown since 1984 from 3.9 million to 6.9 million in 1997. Employment has increased for both males and females since 1992.

ii. Agri-Food Employment

In the agri-food chain, males comprise 54% of employment (Table 14). From 1984 to 1997, female employment in the chain grew from 652,000 to 871,000, an increase of 35%, and accounts for a growing proportion of total agri-food employment. Food service provides the most work for women in agri-food, accounting for 45% of female employment in the chain. For men, the largest agri-food employer is agriculture accounting for 29%, with food service a close second at 28% (Table 14). In agriculture, food wholesale and food processing, men account for more than 66% of employment. Women, on the other hand, make up the greatest proportion of employment in food service and food retail where they account for 58% and 53% of employment, respectively.

## SUMMARY AND CONCLUSIONS

The agri-food chain provides employment for over 1.8 million Canadians, supplying jobs for 13.4% of Canada's employed work force in 1997. The food service industry provided the most jobs in agri-food, employing 668,000 Canadians and accounting for 36% of employment in the agri-food chain. Agriculture employed 423,000 (23%), food retail 424,000 (23%), agri-food processing 232,000 (13%) and food wholesale 100,000 (5%).

Since 1993, the agri-food chain had employment growth for every year except 1997 when employment levels declined by 43,000. Compared to the rest of the economy, the agri-food chain grew at a slower pace during this period, averaging 1.1% annually, compared to 1.7% for the rest of the economy. However, during the recession, employment levels in agri-food declined only slightly while many industries in the rest of the economy suffered major losses.

Since 1984, net growth in employment in the agri-food chain was 279,000, with most of this growth (236,000 jobs) in the food services industry. Food retail provided an increase of 93,000 jobs while food wholesale contributed with a slight increase of 12,000 jobs. Employment in agri-food processing remained relatively stable, while agriculture was the only agri-food industry to suffer losses in employment levels during this period, declining by 68,000 jobs.

During the 1990-91 recession and the period of minimal economic growth that ensued, the agri-food chain suffered few job losses compared with other sectors of the economy. The only agri-food industries to suffer a decline in employment between 1990 and 1992 were food wholesale and agriculture. Food service, on the other hand, recorded a net employment gain of 15,000 over this period.

Part time employment in the agri-food chain grew faster than full time employment. From 1984 to 1997, part time employment grew by 148,000 while full time employment grew by 131,000. As a result, part time jobs accounted for a greater proportion of total agri-food chain employment in 1997. In 1984, 27% of jobs in agri-food were part time. By 1997, part time employment made up 31% of the employment in the agri-food chain. However, from 1993 to 1997, full time employment levels grew as fast as the part time employment levels. Part time employment is particularly important in three agri-food industries, food services (43%), food retail (40%) and agriculture (22%).

Across Canada, the agri-food chain is an important employer, accounting for at least 12% of employment in each of the provinces in 1997. In Saskatchewan the agri-food chain accounted for more than one quarter of employment in the province, while in Ontario and Quebec the agri-food chain provided jobs for 12% and 13% of employed individuals, respectively. These factors underscore the importance of agri-food industries in all provinces.

The agri-food chain is also an important employer for Canada's youth. In 1997, 553,000 young (ages 15-24) Canadians were employed in the agri-food chain, accounting for 27% of total youth employment, second only to the service sector. Fifty-four percent of youth in the agri-food chain were employed in the food service industry. Youth account for 44% of employment in food service. In agriculture, on the other hand, youth make up only 15%, including unpaid family labour. Canadians over the age of 55 accounted for a large proportion of employment in agriculture, accounting for 28% of the industry.

Women were the majority of those employed in food services and food retail, accounting for 58% and 53% of employment in each industry. Men, on the other hand, accounted for almost 70% of those employed in each of the agriculture, food and beverage processing, and food wholesale trade industries.

## **ISSUES FOR FURTHER STUDY**

The present paper is almost entirely descriptive of the major employment trends in the economy and in the agri-food chain. Much more work is needed in order to get underneath the numbers and understand the social, economic and educational factors that are driving the trends.

The rising average age of the farm population points to an approaching crisis in relation to the intergenerational transfer of farm businesses to the next generation. Important questions arise on issues such as barriers to entry, financial planning for retirement of today's farmers, strategies for transferring assets to a younger generation of farmers, and concerns over pensions.

## **APPENDIX**

### **TABLES**

TABLE 1: LABOUR FORCE AND EMPLOYMENT IN CANADA (Employment in Thousands)

|                                               | 1984   | 1985   | 1986   | 1987   | 1988   | 1989   | 1990   | 1991   | 1992   | 1993   | 1994   | 1995   | 1996   | 1997   | Average Annual Growth (%)<br>1984/1990 1990/1992 1992/1997 1997/1997 |
|-----------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------------------------------------------------------------------|
| Working Age Population<br>(15 years and over) | 19,681 | 19,929 | 20,182 | 20,432 | 20,690 | 20,968 | 21,277 | 21,613 | 21,986 | 22,371 | 22,717 | 23,027 | 23,352 | 23,687 | 1.3 1.7 1.4 1.4                                                      |
| Labour Force                                  | 12,853 | 13,123 | 13,378 | 13,631 | 13,901 | 14,151 | 14,329 | 14,408 | 14,482 | 14,664 | 14,832 | 14,928 | 15,145 | 15,354 | 1.8 0.5 1.2 1.4                                                      |
| Participation Rate                            | 65.3%  | 65.8%  | 66.3%  | 66.7%  | 67.2%  | 67.5%  | 67.3%  | 66.7%  | 65.9%  | 65.5%  | 65.3%  | 64.8%  | 64.9%  | 64.8%  |                                                                      |
| Total Employment                              | 11,402 | 11,742 | 12,095 | 12,422 | 12,819 | 13,086 | 13,165 | 12,916 | 12,842 | 13,015 | 13,292 | 13,506 | 13,676 | 13,941 | 2.4 -1.2 1.7 1.6                                                     |
| Total Unemployment                            | 1,450  | 1,381  | 1,283  | 1,208  | 1,082  | 1,065  | 1,164  | 1,492  | 1,640  | 1,649  | 1,541  | 1,422  | 1,469  | 1,414  | -3.4 19.1 -3.7 0.3                                                   |
| Unemployment Rate                             | 11.3%  | 10.5%  | 9.6%   | 8.9%   | 7.8%   | 7.5%   | 8.1%   | 10.4%  | 11.3%  | 11.2%  | 10.4%  | 9.5%   | 9.7%   | 9.2%   |                                                                      |

Source: Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)

TABLE 2: EMPLOYMENT BY SECTOR (Employment in Thousands)

|                            | 1984  | 1985  | 1986  | 1987  | 1988  | 1989  | 1990  | 1991  | 1992  | 1993  | 1994  | 1995  | 1996  | 1997  | Average Annual Growth (%)<br>1984/1990 1990/1992 1992/1997 1997/1997 |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------------------------------------------------------------|
| Other Natural Resources(1) | 292   | 297   | 292   | 295   | 307   | 303   | 298   | 294   | 267   | 259   | 276   | 296   | 280   | 292   | 0.4 -5.3 3.2 0.1                                                     |
| Manufacturing              | 2,040 | 2,062 | 2,096 | 2,124 | 2,213 | 2,234 | 2,104 | 1,955 | 1,877 | 1,892 | 1,947 | 2,061 | 2,083 | 2,167 | 0.6 -5.5 3.5 0.5                                                     |
| Construction               | 575   | 605   | 648   | 708   | 765   | 809   | 820   | 728   | 717   | 691   | 748   | 724   | 719   | 747   | 6.1 -6.4 2.1 2.2                                                     |
| Service                    | 3,553 | 3,795 | 3,942 | 4,090 | 4,245 | 4,352 | 4,488 | 4,572 | 4,622 | 4,790 | 4,933 | 5,036 | 5,141 | 5,303 | 4.0 1.5 2.6 3.1                                                      |
| T C O U (2)                | 877   | 917   | 934   | 941   | 949   | 1,007 | 993   | 960   | 969   | 960   | 978   | 1,033 | 1,020 | 1,037 | 2.1 -1.2 2.0 1.3                                                     |
| Wholesale and Retail       | 1,972 | 2,089 | 2,177 | 2,205 | 2,273 | 2,293 | 2,356 | 2,276 | 2,267 | 2,253 | 2,314 | 2,307 | 2,361 | 2,386 | 3.0 -1.9 1.5 1.5                                                     |

(1) other than agriculture

(2) T C O U - Transportation, Communication and Other Utilities

Source: Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)

**TABLE 3: EMPLOYMENT IN THE AGRI-FOOD CHAIN (Employment in Thousands)**

|                        | 1984         | 1985         | 1986         | 1987         | 1988         | 1989         | 1990         | 1991         | 1992         | 1993         | 1994         | 1995         | 1996         | 1997         | Average Annual Growth (%) |               |               |               |
|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------------|---------------|---------------|---------------|
|                        |              |              |              |              |              |              |              |              |              |              |              |              |              |              | 1984/<br>1990             | 1990/<br>1992 | 1993/<br>1997 | 1984/<br>1997 |
| Agriculture            | 491          | 482          | 476          | 474          | 451          | 438          | 441          | 457          | 437          | 450          | 425          | 431          | 453          | 423          | -1.8                      | -0.4          | -1.4          | -1.1          |
| Agri-Food Processing*  | 260          | 264          | 261          | 269          | 273          | 266          | 254          | 253          | 252          | 245          | 249          | 254          | 256          | 257          | -0.4                      | -0.4          | 1.2           | -0.1          |
| Food Wholesale         | 88           | 98           | 107          | 91           | 97           | 104          | 107          | 96           | 100          | 100          | 107          | 109          | 106          | 100          | 3.7                       | -3.1          | 0.0           | 1.2           |
| Food Retail            | 331          | 347          | 348          | 376          | 399          | 392          | 421          | 417          | 427          | 397          | 399          | 411          | 425          | 424          | 4.2                       | 0.7           | 1.7           | 2.0           |
| Food Services          | 432          | 462          | 502          | 531          | 547          | 565          | 575          | 592          | 590          | 603          | 617          | 646          | 672          | 668          | 4.9                       | 1.3           | 2.6           | 3.4           |
| <b>Agri-Food Chain</b> | <b>1,602</b> | <b>1,653</b> | <b>1,694</b> | <b>1,741</b> | <b>1,767</b> | <b>1,765</b> | <b>1,798</b> | <b>1,815</b> | <b>1,806</b> | <b>1,795</b> | <b>1,797</b> | <b>1,851</b> | <b>1,912</b> | <b>1,871</b> | <b>1.9</b>                | <b>0.2</b>    | <b>1.1</b>    | <b>1.2</b>    |

\*. Agri-Food Processing includes Food, Fish, Beverage and Tobacco Processing

Source Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)

**TABLE 4: EMPLOYMENT COMPARISON ACROSS SECTORS (Employment in Thousands)**

|                                                           | 1984  | 1985  | 1986  | 1987  | 1988  | 1989  | 1990  | 1991  | 1992  | 1993  | 1994  | 1995  | 1996  | 1997  | Average Annual Growth (%) |               |               |               |
|-----------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------------|---------------|---------------|---------------|
|                                                           |       |       |       |       |       |       |       |       |       |       |       |       |       |       | 1984/<br>1990             | 1990/<br>1992 | 1993/<br>1997 | 1984/<br>1997 |
| Agri-Food Chain                                           | 1,602 | 1,653 | 1,694 | 1,741 | 1,767 | 1,765 | 1,798 | 1,815 | 1,806 | 1,795 | 1,797 | 1,851 | 1,912 | 1,871 | 1.9                       | 0.2           | 1.1           | 1.2           |
| Other Natural Resources                                   | 292   | 297   | 292   | 295   | 307   | 303   | 298   | 294   | 267   | 259   | 276   | 296   | 279   | 292   | 0.4                       | -5.3          | 3.2           | 0.1           |
| Other Manufacturing (1)                                   | 1,814 | 1,828 | 1,869 | 1,889 | 1,978 | 2,003 | 1,882 | 1,732 | 1,654 | 1,673 | 1,723 | 1,829 | 1,849 | 1,934 | 0.7                       | -6.2          | 3.7           | 0.6           |
| Other Services (2)                                        | 3,121 | 3,333 | 3,440 | 3,559 | 3,698 | 3,787 | 3,913 | 3,980 | 4,032 | 4,187 | 4,316 | 4,390 | 4,469 | 4,635 | 3.8                       | 1.5           | 2.6           | 3.1           |
| Other Wholesale & Retail (3)                              | 1,553 | 1,644 | 1,721 | 1,739 | 1,776 | 1,797 | 1,828 | 1,763 | 1,740 | 1,756 | 1,808 | 1,786 | 1,830 | 1,862 | 2.8                       | -2.4          | 1.5           | 1.4           |
| (1) excluding food, fish, beverage and tobacco processing |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| (2) excluding food services                               |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| (3) excluding food wholesale and retail                   |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |

Source Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)



**TABLE 6: FULL TIME AND PART TIME EMPLOYMENT BY SECTOR (Employment in Thousands)**

|                                                                                                                                                                                                                                                                                         | 1984  | 1985  | 1986  | 1987  | 1988  | 1989  | 1990  | 1991  | 1992  | 1993  | 1994  | 1995  | 1996  | 1997  | Average Annual Growth (%) |               |               |               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------------|---------------|---------------|---------------|
|                                                                                                                                                                                                                                                                                         | 1984  | 1985  | 1986  | 1987  | 1988  | 1989  | 1990  | 1991  | 1992  | 1993  | 1994  | 1995  | 1996  | 1997  | 1984/<br>1990             | 1990/<br>1992 | 1993/<br>1997 | 1984/<br>1997 |
| <b>Full Time Employment by Sector</b>                                                                                                                                                                                                                                                   |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| Agri-Food Chain                                                                                                                                                                                                                                                                         | 1,168 | 1,212 | 1,236 | 1,273 | 1,272 | 1,276 | 1,282 | 1,262 | 1,262 | 1,240 | 1,240 | 1,289 | 1,330 | 1,291 | 1.6                       | -0.8          | 1.0           | 0.8           |
| Other Natural Resources                                                                                                                                                                                                                                                                 | 283   | 286   | 281   | 286   | 295   | 292   | 287   | 282   | 254   | 247   | 265   | 282   | 267   | 279   | 0.3                       | -5.8          | 3.2           | 0.0           |
| Construction                                                                                                                                                                                                                                                                            | 528   | 552   | 595   | 653   | 711   | 750   | 763   | 660   | 634   | 615   | 672   | 647   | 642   | 671   | 6.4                       | -8.7          | 2.3           | 2.1           |
| Total Manufacturing                                                                                                                                                                                                                                                                     | 1,966 | 1,979 | 2,017 | 2,045 | 2,125 | 2,141 | 2,026 | 1,873 | 1,789 | 1,807 | 1,856 | 1,960 | 1,979 | 2,067 | 0.5                       | -6.0          | 3.4           | 0.5           |
| Other Manufacturing (1)                                                                                                                                                                                                                                                                 | 1,753 | 1,759 | 1,803 | 1,822 | 1,905 | 1,923 | 1,818 | 1,664 | 1,581 | 1,601 | 1,647 | 1,745 | 1,764 | 1,829 | 0.7                       | -6.7          | 3.4           | 0.4           |
| Total Service                                                                                                                                                                                                                                                                           | 2,636 | 2,783 | 2,904 | 3,040 | 3,150 | 3,247 | 3,338 | 3,351 | 3,385 | 3,474 | 3,601 | 3,687 | 3,741 | 3,836 | 4.0                       | 0.7           | 2.5           | 2.9           |
| Other Services (2)                                                                                                                                                                                                                                                                      | 2,375 | 2,509 | 2,604 | 2,712 | 2,821 | 2,895 | 2,990 | 3,013 | 3,042 | 3,127 | 3,243 | 3,307 | 3,343 | 3,456 | 3.9                       | 0.9           | 2.5           | 2.9           |
| Total Wholesale and Retail                                                                                                                                                                                                                                                              | 1,475 | 1,572 | 1,644 | 1,666 | 1,704 | 1,730 | 1,775 | 1,684 | 1,682 | 1,656 | 1,706 | 1,717 | 1,747 | 1,770 | 3.2                       | -2.6          | 1.7           | 1.4           |
| Other Wholesale and Retail(3)                                                                                                                                                                                                                                                           | 1,180 | 1,253 | 1,316 | 1,337 | 1,358 | 1,388 | 1,413 | 1,346 | 1,327 | 1,332 | 1,378 | 1,371 | 1,404 | 1,428 | 3.1                       | -3.1          | 1.8           | 1.5           |
| T C O U (4)                                                                                                                                                                                                                                                                             | 812   | 847   | 863   | 869   | 875   | 923   | 910   | 870   | 874   | 867   | 886   | 936   | 921   | 934   | 1.9                       | -2.0          | 1.9           | 1.1           |
| <b>Part Time Employment by Sector</b>                                                                                                                                                                                                                                                   |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| Agri-Food Chain                                                                                                                                                                                                                                                                         | 434   | 441   | 459   | 467   | 495   | 488   | 516   | 553   | 545   | 555   | 557   | 563   | 582   | 581   | 2.9                       | 2.8           | 1.2           | 2.3           |
| Other Natural Resources                                                                                                                                                                                                                                                                 | 7     | 8     | 8     | 8     | 9     | 8     | 7     | 9     | 9     | 9     | 9     | 14    | 13    | 13    | 0.5                       | 14.3          | 12.1          | 6.2           |
| Construction                                                                                                                                                                                                                                                                            | 44    | 50    | 51    | 47    | 47    | 53    | 55    | 64    | 79    | 74    | 73    | 76    | 77    | 77    | 4.1                       | 19.9          | 0.9           | 4.7           |
| Total Manufacturing                                                                                                                                                                                                                                                                     | 72    | 79    | 76    | 77    | 85    | 92    | 76    | 78    | 87    | 84    | 90    | 101   | 104   | 100   | 1.4                       | 7.1           | 4.5           | 2.9           |
| Other Manufacturing (1)                                                                                                                                                                                                                                                                 | 59    | 65    | 63    | 65    | 70    | 80    | 62    | 64    | 72    | 70    | 75    | 84    | 85    | 82    | 1.6                       | 8.5           | 4.2           | 3.1           |
| Total Service                                                                                                                                                                                                                                                                           | 917   | 1,008 | 1,032 | 1,049 | 1,090 | 1,100 | 1,142 | 1,218 | 1,231 | 1,314 | 1,329 | 1,350 | 1,400 | 1,467 | 3.8                       | 3.9           | 2.8           | 3.7           |
| Other Services (2)                                                                                                                                                                                                                                                                      | 746   | 821   | 830   | 846   | 872   | 887   | 914   | 964   | 984   | 1,058 | 1,070 | 1,083 | 1,127 | 1,179 | 3.5                       | 3.8           | 2.7           | 3.6           |
| Total Wholesale & Retail                                                                                                                                                                                                                                                                | 497   | 513   | 529   | 536   | 564   | 557   | 576   | 588   | 577   | 593   | 608   | 589   | 614   | 616   | 2.5                       | 0.1           | 1.0           | 1.7           |
| Other Wholesale & Retail (3)                                                                                                                                                                                                                                                            | 372   | 387   | 401   | 398   | 414   | 403   | 410   | 413   | 405   | 420   | 430   | 415   | 426   | 434   | 1.6                       | -0.6          | 0.9           | 1.2           |
| T C O U (4)                                                                                                                                                                                                                                                                             | 62    | 64    | 66    | 71    | 73    | 83    | 83    | 89    | 93    | 92    | 90    | 97    | 99    | 103   | 5.1                       | 5.9           | 3.0           | 4.1           |
| (1) excluding food, fish, beverage and tobacco processing<br>(2) excluding food services<br>(3) excluding food wholesale and retail<br>(4) T C O U - Transportation, Communication and Other Utilities<br>Source: Labour Force Survey, Special Tabulation #P98014 (obtained April 1998) |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |



**TABLE 8: EMPLOYMENT BY PROVINCE AND PROVINCIAL SHARE OF TOTAL EMPLOYMENT (Employment in Thousands)**

| Province             | 1984   | 1985   | 1986   | 1987   | 1988   | 1989   | 1990   | 1991   | 1992   | 1993   | 1994   | 1995   | 1996   | 1997   |
|----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Canada               | 11,402 | 11,742 | 12,095 | 12,422 | 12,819 | 13,086 | 13,165 | 12,916 | 12,842 | 13,015 | 13,292 | 13,506 | 13,676 | 13,941 |
| Newfoundland         | 178    | 179    | 184    | 188    | 198    | 206    | 206    | 203    | 194    | 193    | 195    | 197    | 190    | 192    |
| Prince Edward Island | 50     | 51     | 52     | 53     | 54     | 55     | 55     | 53     | 54     | 54     | 56     | 59     | 60     | 61     |
| Nova Scotia          | 344    | 344    | 353    | 360    | 377    | 384    | 390    | 382    | 371    | 368    | 380    | 384    | 385    | 392    |
| New Brunswick        | 255    | 264    | 273    | 282    | 291    | 296    | 302    | 297    | 302    | 305    | 307    | 314    | 313    | 316    |
| Quebec               | 2,789  | 2,879  | 2,948  | 3,034  | 3,121  | 3,157  | 3,172  | 3,099  | 3,067  | 3,080  | 3,156  | 3,204  | 3,213  | 3,260  |
| Ontario              | 4,444  | 4,608  | 4,772  | 4,951  | 5,136  | 5,241  | 5,226  | 5,044  | 5,001  | 5,089  | 5,160  | 5,231  | 5,311  | 5,413  |
| Manitoba             | 484    | 491    | 503    | 508    | 508    | 513    | 518    | 506    | 498    | 509    | 511    | 521    | 526    | 538    |
| Saskatchewan         | 449    | 459    | 466    | 468    | 465    | 458    | 459    | 458    | 451    | 455    | 457    | 460    | 461    | 474    |
| Alberta              | 1,149  | 1,170  | 1,189  | 1,188  | 1,224  | 1,254  | 1,277  | 1,290  | 1,285  | 1,296  | 1,337  | 1,373  | 1,413  | 1,457  |
| British Columbia     | 1,263  | 1,297  | 1,354  | 1,390  | 1,444  | 1,524  | 1,561  | 1,585  | 1,619  | 1,666  | 1,733  | 1,762  | 1,806  | 1,838  |

**PROVINCIAL SHARE OF TOTAL EMPLOYMENT (%)**

|                      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|----------------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Newfoundland         | 1.6  | 1.5  | 1.5  | 1.5  | 1.5  | 1.6  | 1.6  | 1.6  | 1.5  | 1.5  | 1.5  | 1.5  | 1.4  | 1.4  |
| Prince Edward Island | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  |
| Nova Scotia          | 3.0  | 2.9  | 2.9  | 2.9  | 2.9  | 2.9  | 3.0  | 3.0  | 2.9  | 2.8  | 2.9  | 2.8  | 2.8  | 2.8  |
| New Brunswick        | 2.2  | 2.3  | 2.3  | 2.3  | 2.3  | 2.3  | 2.3  | 2.3  | 2.4  | 2.3  | 2.3  | 2.3  | 2.3  | 2.3  |
| Quebec               | 24.5 | 24.5 | 24.4 | 24.4 | 24.3 | 24.1 | 24.1 | 24.0 | 23.9 | 23.7 | 23.7 | 23.7 | 23.5 | 23.4 |
| Ontario              | 39.0 | 39.2 | 39.5 | 39.9 | 40.1 | 40.0 | 39.7 | 39.0 | 38.9 | 39.1 | 38.8 | 38.7 | 38.8 | 38.8 |
| Manitoba             | 4.2  | 4.2  | 4.2  | 4.1  | 4.0  | 3.9  | 3.9  | 3.9  | 3.9  | 3.9  | 3.8  | 3.9  | 3.8  | 3.9  |
| Saskatchewan         | 3.9  | 3.9  | 3.9  | 3.8  | 3.6  | 3.5  | 3.5  | 3.5  | 3.5  | 3.5  | 3.4  | 3.4  | 3.4  | 3.4  |
| Alberta              | 10.1 | 10.0 | 9.8  | 9.6  | 9.6  | 9.6  | 9.7  | 10.0 | 10.0 | 10.0 | 10.1 | 10.2 | 10.3 | 10.5 |
| British Columbia     | 11.1 | 11.0 | 11.2 | 11.2 | 11.3 | 11.6 | 11.9 | 12.3 | 12.6 | 12.8 | 13.0 | 13.0 | 13.2 | 13.2 |

Source: Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)



TABLE 11: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 25-44 (Employment in Thousands)

|                                                                              | 1984  | 1985  | 1986  | 1987  | 1988  | 1989  | 1990  | 1991  | 1992  | 1993  | 1994  | 1995  | 1996  | 1997  | Average Annual Growth (%) |               |               |               |
|------------------------------------------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------------|---------------|---------------|---------------|
|                                                                              |       |       |       |       |       |       |       |       |       |       |       |       |       |       | 1984/<br>1990             | 1990/<br>1992 | 1993/<br>1997 | 1984/<br>1997 |
| Agri-Food Chain                                                              | 623   | 653   | 701   | 742   | 743   | 749   | 793   | 800   | 811   | 800   | 789   | 851   | 842   | 835   | 4.1                       | 1.1           | 1.2           | 2.3           |
| Other Natural Resources                                                      | 165   | 170   | 175   | 178   | 185   | 178   | 179   | 179   | 153   | 150   | 159   | 173   | 160   | 166   | 1.4                       | -7.3          | 2.7           | 0.2           |
| Other Manufacturing (1)                                                      | 965   | 1,002 | 1,056 | 1,069 | 1,156 | 1,189 | 1,124 | 1,058 | 1,004 | 1,021 | 1,045 | 1,106 | 1,113 | 1,135 | 2.7                       | -5.5          | 2.7           | 1.3           |
| Construction                                                                 | 311   | 327   | 338   | 373   | 425   | 447   | 470   | 426   | 413   | 414   | 446   | 420   | 423   | 431   | 7.2                       | -6.2          | 1.1           | 2.7           |
| Other Services (2)                                                           | 1,679 | 1,808 | 1,880 | 1,967 | 2,069 | 2,127 | 2,222 | 2,268 | 2,268 | 2,343 | 2,383 | 2,417 | 2,450 | 2,528 | 4.8                       | 1.0           | 1.9           | 3.2           |
| T C O U (3)                                                                  | 500   | 538   | 569   | 580   | 583   | 619   | 618   | 602   | 606   | 595   | 615   | 635   | 624   | 626   | 3.6                       | -1.0          | 1.3           | 1.8           |
| Other Wholesale & Retail (4)                                                 | 757   | 801   | 870   | 870   | 901   | 939   | 966   | 943   | 934   | 942   | 978   | 977   | 939   | 961   | 4.2                       | -1.7          | 0.5           | 1.9           |
| (1) excluding food, fish, beverage and tobacco processing                    |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| (2) excluding food services                                                  |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| (3) T C O U - Transportation, Communication and Other Utilities              |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| (4) excluding food wholesale and retail                                      |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |
| Source Labour Force Survey, Special Tabulation #P98014 (obtained April 1998) |       |       |       |       |       |       |       |       |       |       |       |       |       |       |                           |               |               |               |

TABLE 12: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 45-54 (Employment in Thousands)

|                                                                              | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996  | 1997  | Average Annual Growth (%) |               |               |               |
|------------------------------------------------------------------------------|------|------|------|------|------|------|------|------|------|------|------|------|-------|-------|---------------------------|---------------|---------------|---------------|
|                                                                              |      |      |      |      |      |      |      |      |      |      |      |      |       |       | 1984/<br>1990             | 1990/<br>1992 | 1993/<br>1997 | 1984/<br>1997 |
| Agri-Food Chain                                                              | 216  | 229  | 209  | 231  | 228  | 251  | 237  | 245  | 248  | 265  | 257  | 290  | 279   | 285   | 1.9                       | 2.4           | 2.0           | 2.4           |
| Other Natural Resources                                                      | 39   | 39   | 43   | 45   | 47   | 46   | 47   | 53   | 46   | 44   | 53   | 63   | 63    | 66    | 3.2                       | -0.2          | 10.9          | 4.5           |
| Other Manufacturing (1)                                                      | 295  | 294  | 297  | 295  | 306  | 327  | 322  | 315  | 326  | 342  | 347  | 376  | 391   | 412   | 1.5                       | 0.7           | 4.8           | 2.7           |
| Construction                                                                 | 101  | 104  | 116  | 118  | 125  | 128  | 130  | 129  | 135  | 121  | 135  | 141  | 142   | 155   | 4.4                       | 1.9           | 6.5           | 3.5           |
| Other Services (2)                                                           | 451  | 499  | 527  | 553  | 596  | 636  | 679  | 736  | 793  | 845  | 927  | 964  | 1,013 | 1,079 | 7.1                       | 8.1           | 6.3           | 7.0           |
| T C O U (3)                                                                  | 158  | 156  | 152  | 162  | 164  | 171  | 173  | 173  | 184  | 200  | 206  | 238  | 237   | 244   | 1.6                       | 3.2           | 5.3           | 3.5           |
| Other Wholesale & Retail (4)                                                 | 232  | 240  | 246  | 250  | 269  | 264  | 281  | 276  | 287  | 305  | 310  | 309  | 310   | 317   | 3.3                       | 1.1           | 1.0           | 2.5           |
| (1) excluding food, fish, beverage and tobacco processing                    |      |      |      |      |      |      |      |      |      |      |      |      |       |       |                           |               |               |               |
| (2) excluding food services                                                  |      |      |      |      |      |      |      |      |      |      |      |      |       |       |                           |               |               |               |
| (3) T C O U - Transportation, Communication and Other Utilities              |      |      |      |      |      |      |      |      |      |      |      |      |       |       |                           |               |               |               |
| (4) excluding food wholesale and retail                                      |      |      |      |      |      |      |      |      |      |      |      |      |       |       |                           |               |               |               |
| Source Labour Force Survey, Special Tabulation #P98014 (obtained April 1998) |      |      |      |      |      |      |      |      |      |      |      |      |       |       |                           |               |               |               |



TABLE 14: TOTAL EMPLOYMENT IN THE AGRI-FOOD CHAIN BY GENDER, 1984-1997 (Employment in Thousands)

|                       | 1984 | 1985 | 1986 | 1987  | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995  | 1996  | 1997  | Share of Sub-sector<br>Employment (%) |
|-----------------------|------|------|------|-------|------|------|------|------|------|------|------|-------|-------|-------|---------------------------------------|
| <b>MALES</b>          |      |      |      |       |      |      |      |      |      |      |      |       |       |       |                                       |
| Agriculture           | 349  | 341  | 333  | 336   | 313  | 301  | 301  | 309  | 300  | 306  | 285  | 292   | 306   | 285   | 67                                    |
| Agri-Food Processing* | 180  | 185  | 180  | 180   | 181  | 182  | 172  | 168  | 164  | 165  | 168  | 173   | 168   | 170   | 66                                    |
| Food Wholesale        | 67   | 74   | 78   | 67    | 70   | 75   | 77   | 68   | 73   | 70   | 77   | 74    | 75    | 68    | 68                                    |
| Food Retail           | 176  | 180  | 183  | 190   | 197  | 193  | 207  | 200  | 201  | 192  | 189  | 196   | 202   | 201   | 47                                    |
| Food Services         | 178  | 193  | 213  | 231   | 238  | 244  | 240  | 247  | 246  | 264  | 268  | 279   | 290   | 278   | 42                                    |
| Agri-Food Chain       | 950  | 972  | 987  | 1,004 | 999  | 994  | 997  | 993  | 984  | 997  | 989  | 1,014 | 1,042 | 1,001 | 53.5                                  |
| <b>FEMALES</b>        |      |      |      |       |      |      |      |      |      |      |      |       |       |       |                                       |
| Agriculture           | 142  | 140  | 143  | 138   | 138  | 137  | 140  | 148  | 137  | 145  | 140  | 138   | 148   | 138   | 33                                    |
| Agri-Food Processing* | 80   | 80   | 81   | 88    | 92   | 84   | 82   | 85   | 88   | 80   | 81   | 81    | 87    | 87    | 34                                    |
| Food Wholesale        | 21   | 24   | 29   | 24    | 28   | 29   | 30   | 28   | 27   | 30   | 30   | 35    | 31    | 32    | 32                                    |
| Food Retail           | 156  | 168  | 166  | 186   | 202  | 199  | 215  | 217  | 226  | 205  | 210  | 216   | 223   | 223   | 53                                    |
| Food Services         | 254  | 269  | 289  | 300   | 309  | 321  | 335  | 345  | 344  | 339  | 349  | 367   | 382   | 390   | 58                                    |
| Agri-Food Chain       | 652  | 680  | 708  | 736   | 768  | 770  | 801  | 823  | 823  | 799  | 809  | 837   | 870   | 871   | 46.5                                  |

\*Agri-Food Processing includes food, fish, beverage and tobacco processing

Source: Labour Force Survey, Special Tabulation #P98014 (obtained April 1998)



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